RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System (CRS)
For FY 2008 Clinical Measures
(BGP)

GUI User Manual

Version 8.0
March 2008

Office of Information Technology (OIT)
Division of Information Resources
Albuquerque, New Mexico

PREFACE

This manual contains the GUI user manual for the CRS Clinical Reporting System version 8.0, which adds FY 2008 clinical performance measures to existing FY 2002 through FY 2007 measures.

The CRS Clinical Reporting System is an RPMS (Resource and Patient Management System) software application designed for national reporting as well as local and Area monitoring of clinical GPRA and developmental measures. CRS was first released for FY 2002 performance measures (as GPRA+) and is based on a design by the Aberdeen Area (GPRA2000).

The Government Performance and Results Act (GPRA) requires Federal agencies to report annually on how the agency measured up against the performance targets set in its annual Plan. IHS GPRA measures include measures for clinical prevention and treatment, quality of care, infrastructure, and administrative efficiency functions. The CRS Clinical Reporting System is the reporting tool used by the IHS Office of Planning and Evaluation to collect and report clinical performance results annually to the Department of Health and Human Services (DHHS) and to Congress.

Each year, an updated version of CRS software is released to reflect changes in the logic descriptions of the different denominators and numerators. Additional performance measures may also be added. Local facilities can run reports as often as they want to and can also use CRS to transmit data to their Area. The Area Office can use CRS to produce an aggregated Area report for either annual GPRA or Area Director Performance reports.

The CRS Clinical Reporting System will produce reports on demand from local RPMS databases for both GPRA and developmental clinical performance measures that are based on RPMS data. CRS is intended to eliminate the need for manual chart audits for evaluating and reporting clinical measures. Administrative and clinical users will be able to review individual or all measures at any time, and can:

- Identify potential data issues in their RPMS, i.e., missing or incorrect data.
- Monitor their site’s performance against past national performance and upcoming agency goals.
- Identify specific areas where the facility is not meeting the measure in order to initiate business process or other changes.
- Quickly measure impact of process changes on performance measures;
- Identify IHS Areas meeting or exceeding measures to provide lessons learned.

To produce reports with comparable data across every facility, the GPRA measure definition was “translated” into programming code with the assistance of clinical subject matter experts. CRS uses pre-defined taxonomies to find data items in PCC to determine if a patient meets the performance measure criteria. Taxonomies contain groups of codes (e.g., diagnoses or procedures) or site-specific terms. Each performance measure topic has one or more denominators and numerators defined.

CRS is intended for use by Area and site Quality Improvement staff, Compliance Officers, GPRA Coordinators, clinical staff such as physicians, nurses, nurse practitioners, and other providers, Area Directors, as well as any staff involved with quality assurance initiatives.

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1.0 About This Manual

An optional graphical user interface (GUI) is available for the CRS software, in addition to the existing character-based user interface (CHUI), also known as the "roll and scroll" version. The GUI contains all of the same basic functionality as the CHUI version, including setting up site parameters and taxonomies, running reports and patient lists at the facility level, and running reports at the Area level.

This manual provides user instructions for the CRS Clinical Reporting System version 8.0 (FY 2008 Clinical Performance Measures) GUI interface.

In order to avoid redundancy, this manual only includes the steps for using the CRS GUI and does not include background information such as security keys, report content, performance measure logic, or summary of application changes; for this information, refer to the BGP V 8.0 User Manual.

For information on the logic used and sample output for each individual performance measure, refer to the Admistration Manual. For information on installing the CRS GUI on your RPMS server and client PC, refer to the BGP v8.0 Installation Guide.

2.0 Opening the CRS GUI

1. After the CRS GUI software has been installed, an icon will be placed on your Windows desktop that is labeled “Visual CRS.” Double-click that icon to open the CRS GUI.

2. At the RPMS Server Address window, type (1) the IP address, (2) the port number of the machine you are connecting to, and (3) the namespace you wish to use. **NOTE: You will only have to enter this information once if you always connect to the same machine.**

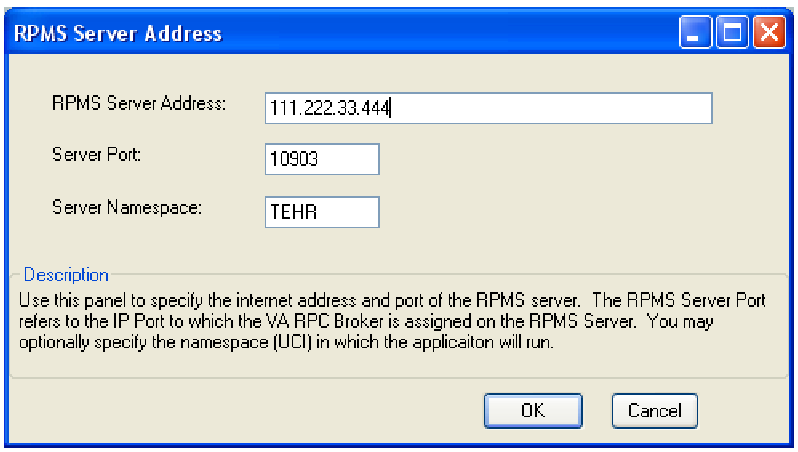

Figure 2-1: RPMS Server Address Screen

3. Click OK.

4. At the RPMS Login window, type your (1) RPMS Access Code and (2) Verify Code. **NOTE: If the port has integrated security turned on, this message will not be displayed since integrated security ties your windows login to your RPMS Access and Verify Code, thus eliminating the need to login twice.**

5. Click OK.

6. After a few moments, the Select Division window is displayed. Select a Division and click OK. **NOTE: This window will only be displayed if data for multiple facilities is stored on the same RPMS database.**

7. The Select CRS Product window is displayed. You may choose to run any of the available GUI versions. Select CRS 2008-Version 8.0 from the drop-down list.

8. The Visual CRS window is displayed (Figure 2-2).

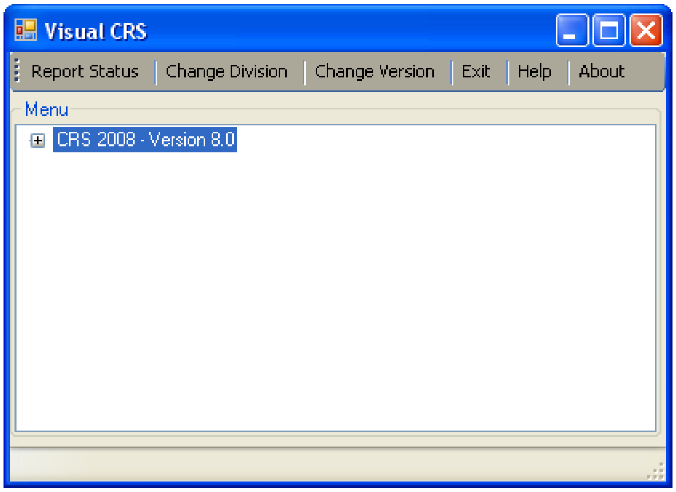

Figure 2-2: Visual CRS Window

There are six toolbar options and one menu option of CRS 2008-Version 8.0. The six toolbar options are described below.

- **Report Status** – Displays a list of reports that are currently running and those that have completed. You may click a report to have it automatically opened in Word or Excel, depending on the output option selected when the report was run. For additional information on Report Status, see section 6.0.
- **Change Division** – Allows you to change to a different facility on the RPMS database, in the event data for multiple facilities is stored on the same RPMS database.
- **Change Version** – Allows you to change to a different version of the CRS software. For example, if you are currently running CRS 2008-Version 8.0, you can change to CRS 2007-Version 7.0.
- **Exit** – Exits the Visual CRS application. You may also exit by clicking the red "X" in the top right corner of the window.
- **Help** – Provides online help for the Visual CRS application. Within the Help tab, there are four help options: Visual CRS, Reports, Setup, and Area Options.
- **About** - Shows the version and build number of the Visual CRS application.

9. Click the **+** at the left of the CRS 2008-Version 8.0 folder to open the CRS 2008-Version 8.0 menu (Figure 2-3).

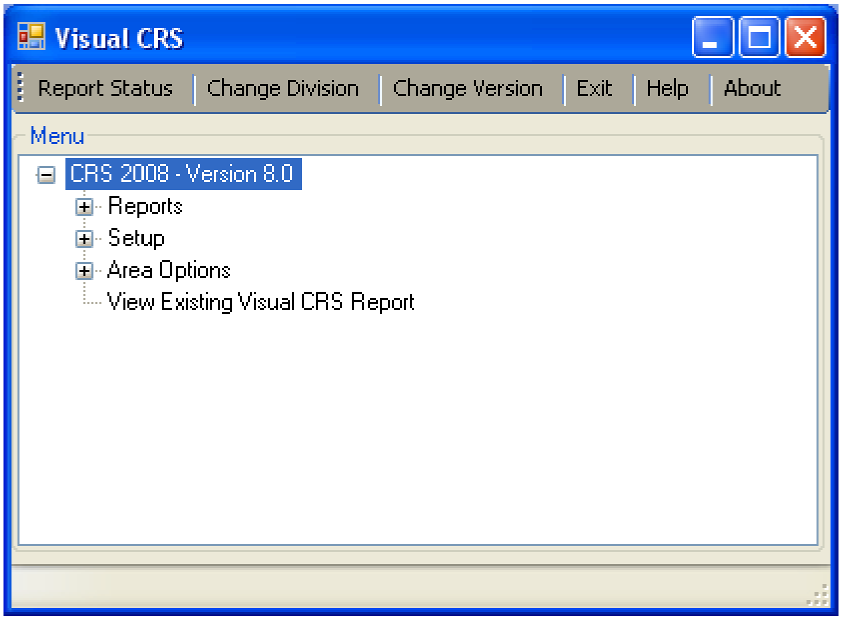

Figure 2-3: CRS 2008 Menu

There are four CRS 2008 menu options, as described below.

- **Reports** – Run National GPRA, local, other national (e.g. HEDIS), and taxonomy reports and patient lists.
- **Setup** – Run taxonomy checks, view and set up site-populated taxonomies, set up site parameters (i.e. define facility location, default Community taxonomy, and Home location; choose whether or not to set parameter for CHS-only facilities; choose whether or not to export height and weight data to the Area Office;[1] and for Alaska facilities only, choose whether or not to set site parameter for MFI facilities).
- **Area Options – NOTE: This option is only displayed for users with the BGPZAREA security key.** Upload and run Area aggregate reports and the Area Height and Weight Data File from individual sites, list all CRS 2008 files in a specified directory).
- **View Existing Visual CRS Report** – View a report created in Visual CRS 2008 in Excel or Word.

[1] Federal and Urban facilities are required to set this to “Yes.” Tribal facilities have the option to set it to “No.”

3.0 Getting Started: System Setup

1. From the Visual CRS window (Figure 2-2), click the **+** at the left of the CRS 2008-Version 8.0 folder to open the CRS 2008-Version 8.0 menu.

2. Click the **+** at the left of the Setup folder to open the Setup menu, as shown in Figure 3-1. There are three menu options (i.e. Taxonomy Check, Taxonomy Setup, and Site Parameters), which are described in the sections that follow.

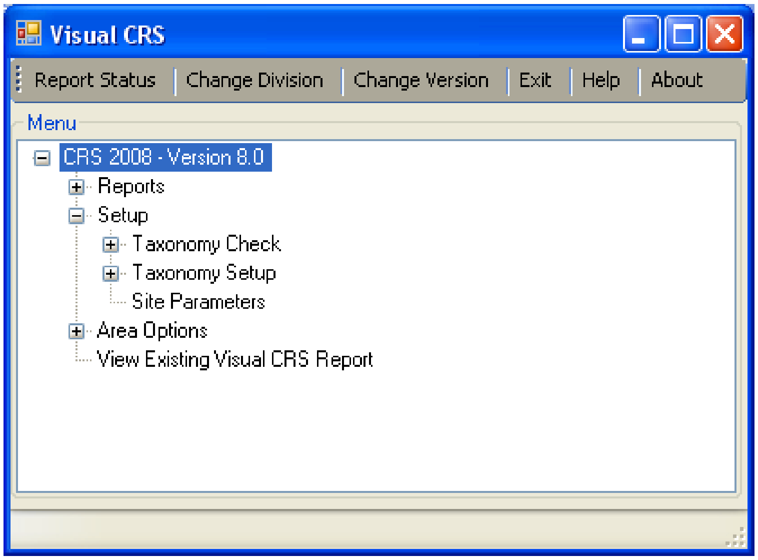

Figure 3-1: Setup Menu

3.1 Site Parameters

Refer to section 4.2 in the User Manual for background information on site parameters.

1. From the Setup Menu (Figure 3-1), click the Site Parameters option.

2. The CRS Site Parameters window is displayed, as shown in Figure 3-2 below.

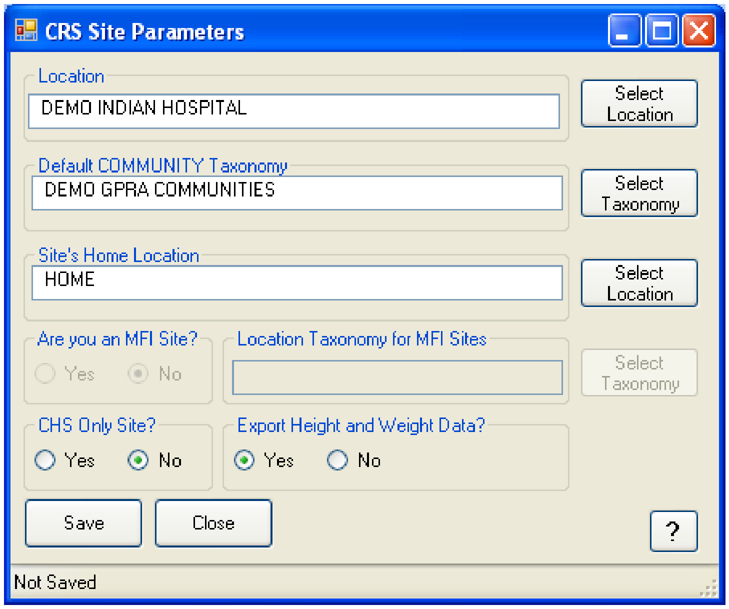

Figure 3-2: CRS Site Parameters Window

3. Click Select Location to select the location of the facility that will be running CRS.

4. A dialog box will appear, prompting you to either edit an existing site's parameter or add a new location. If you wish to edit an existing site's parameters, click Yes and continue to step 5. If you wish to edit site parameters for a new site, click No and skip to step 6.

5. A list of existing sites will appear. From the drop down menu, select the site you want to edit site parameters for. Skip to step 10.

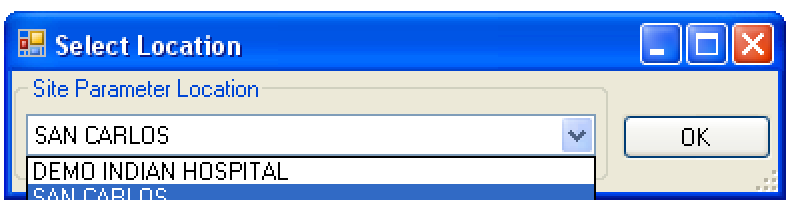

Figure 3-3: Selecting site parameters for an existing site

6. The Locations window is displayed. Due to the size of the Locations file, no locations are displayed. To search for a location, type either the first few characters or the full facility name in the Begin String box. The default is to display the first 100 records that begin with the search string you entered. However, you may change the number of records that are displayed by clicking the down arrow in the list box and selecting one of the values. Then click Search to display the list of locations. In Figure 3-4 shown below, a search string of "DE" was entered, and 10 locations were found. If more locations were found that could fit on a single window, you could view the remainder of the locations by clicking the More button, which is only enabled if there are more locations to view than are displayed.

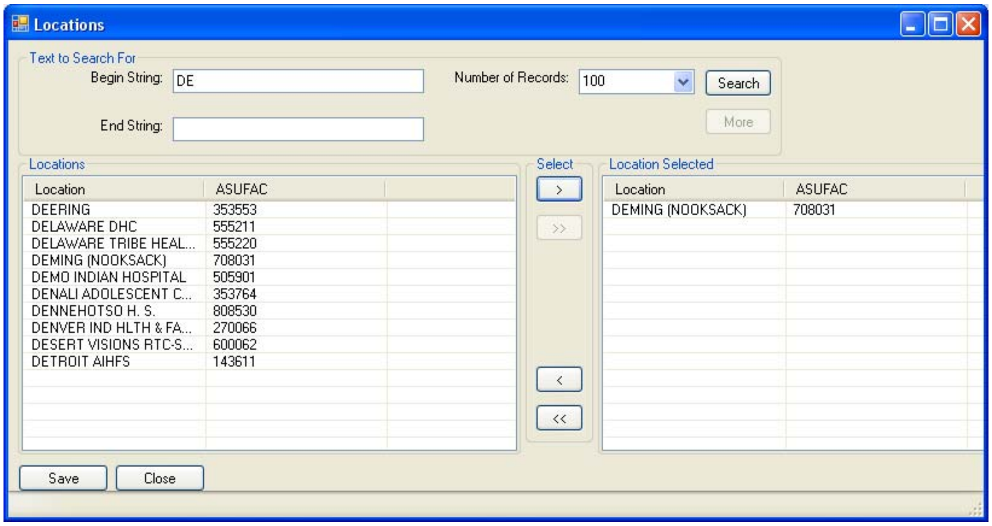

Figure 3-4: Locations Window, Selecting a Location

7. Select a location by clicking the name of the Location in the left frame of the window. You will know it is selected because it will be highlighted in blue.

8. Click the > arrow under the Select group to finish the selection. The location you selected will now be listed in the Locations Selected group.

   If you want to remove the selected location, click the location in the right frame, then click the < button.

9. From the CRS Site Parameters window, click the Select Taxonomy button to select the default community taxonomy for the CRS reports. Refer to section 4.1 in the User Manual for information on creating a community taxonomy for use in CRS.

10. The Taxonomies window is displayed and a list of the community taxonomies is displayed in the left frame. Select a community taxonomy as described in steps 6-8 above.

11. From the CRS Site Parameters window, click the Select Location button to select the site's home location that is used for reporting of Public Health Nursing home visits.

12. Select the home location for your facility by following steps 6-8 above.

13. Click Save to save the selected location. To close the window without saving the new location, click Close.

14. The Are you an MFI Site? radio button and Select Taxonomy [Location Taxonomy for MFI sites] button will only be enabled for facilities within the Alaska Area and no action is required for non-Alaska facilities.

15. From the CRS Site Parameters window (Figure 3-2), <u>ONLY</u> click the Yes radio button <u>IF</u> your <u>facility offers ONLY Contract Health Services to its patients (i.e. it does not provide any direct care services).</u> See section 4.2 in the User Manual for more information on this site parameter.

16. From the CRS Site Parameters window, click the Yes radio button if your facility wants to export its height and weight data to the Area Office for use by the IHS Division of Epidemiology. All Federal and Urban facilities are required to export their data and Tribal sites are encouraged to export their data so it may be used to establish trends in obesity among the AI/AN population. Tribal facilities not wanting to export their data should click the No radio button.

17. Click the Save button to save your site parameters.

18. Click the Close button to close the CRS Site Parameters window.

3.2 Taxonomy Check and Setup

Refer to section 4.3 in the User Manual for background information on taxonomies.

3.2.1 Taxonomy Check

1. From the Setup Menu (Figure 3-1), click the **+** at the left of the Taxonomy Check folder to display the taxonomy check options, as shown in Figure 3-5.

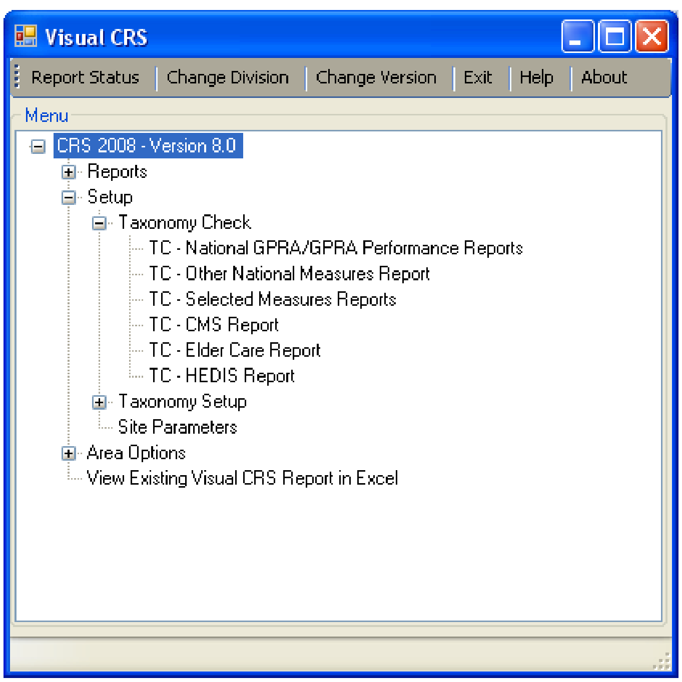

Figure 3-5: Taxonomy Check Options

2. Click the desired taxonomy check option to run. See section 4.3 in the User Manual for information on the taxonomy check options.

3. The software checks the taxonomies. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. Once you have setup the taxonomies, re-run the taxonomy check for the report. In either case, click OK to close the window.

3.2.2 Taxonomy Setup

1. From the Setup Menu (Figure 3-1), click the + at the left of the Taxonomy Setup folder to display the taxonomy setup options, as shown in Figure 3-6.

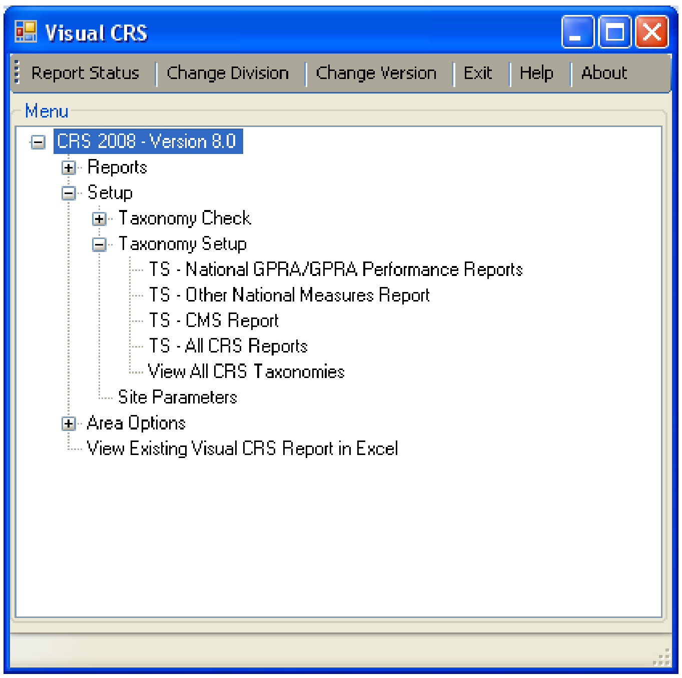

Figure 3-6: Taxonomy Setup Options

2. Click the desired taxonomy setup option. See section 4.3 in the User Manual for information on the taxonomy setup options. The process for setting up taxonomies for all reports is the same, as described in the steps below.

3. A message is displayed advising you it may take some time to load the taxonomies. Click Yes to continue.

4. The Add/Edit Taxonomy window is displayed. Select the taxonomy you want to edit by clicking the down arrow from the Select Taxonomy drop-down list and clicking the taxonomy.

5. The items available to be added to the taxonomy are listed in the left frame, and the items already included in the taxonomy are listed in the right frame, as shown in Figure 3-7. To add an item, click the item, which will be highlighted in blue,

then click the > button in the Select group. To add all of the items in the list to the taxonomy, click the >> button. To remove one item from the taxonomy, click the item, then click the < button. To remove all items from the taxonomy, click the << button.

6. To save your changes, click Save.

7. To exit the window, click Close.

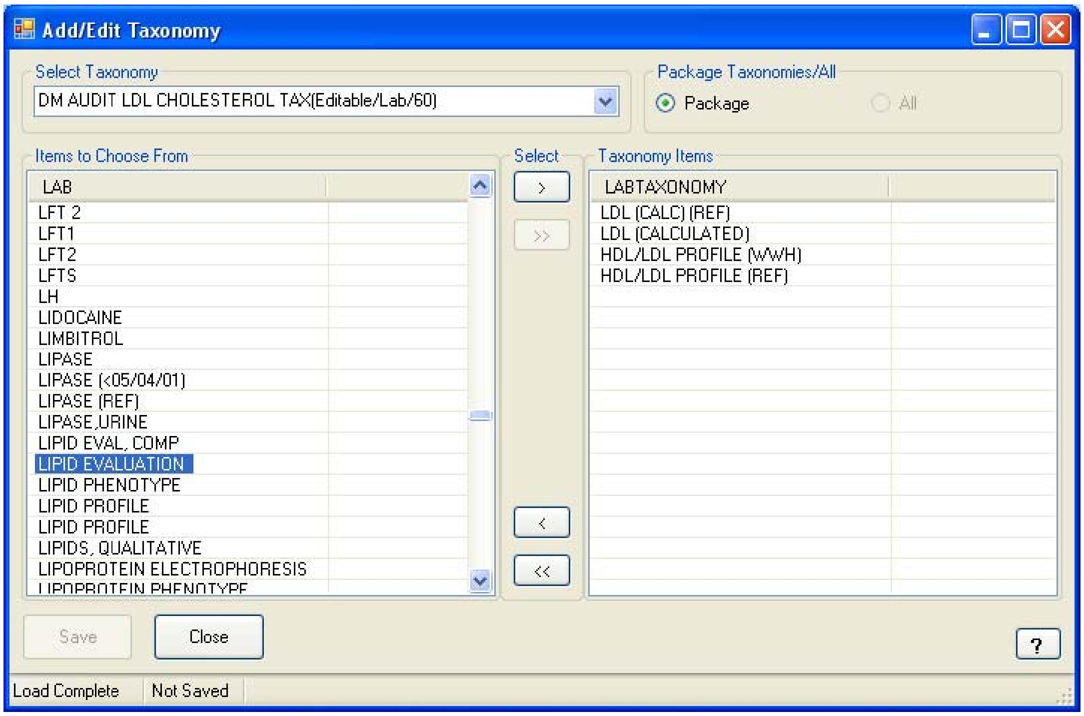

Figure 3-7: Adding an Item to a Site-populated Taxonomy

NOTE: If you've selected the View all CRS Taxonomies menu option, you will not be able to add/edit taxonomies. Instead of the Add/Edit Taxonomy screen appearing, you will see the View Taxonomy screen.

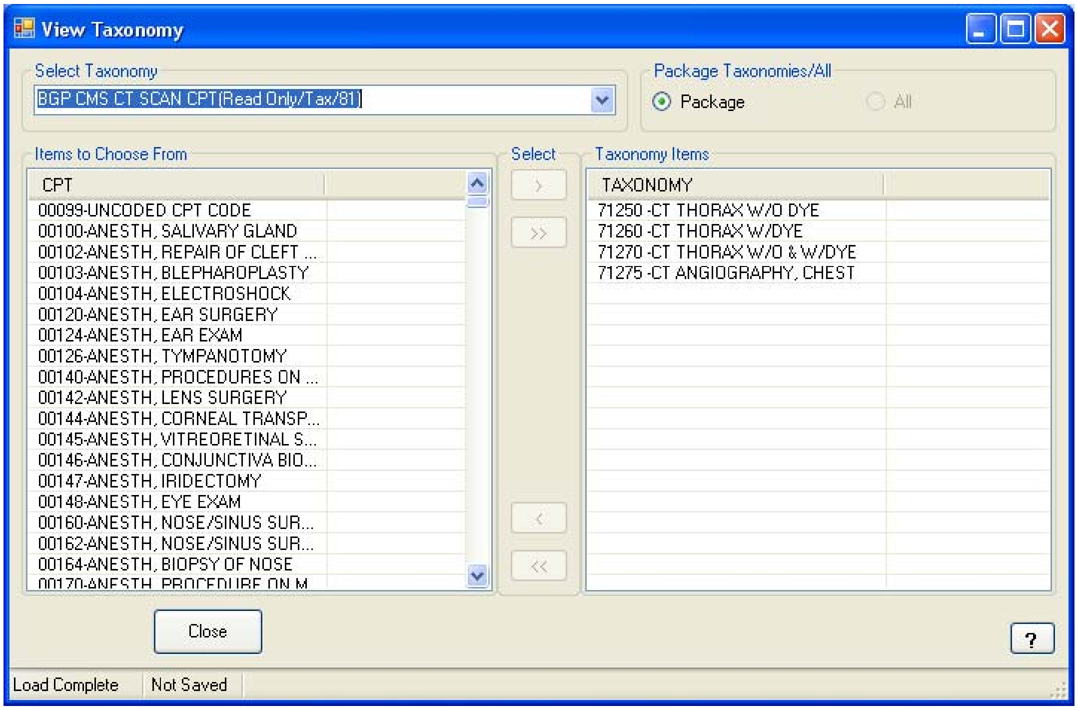

Figure 3-8: View Taxonomy Window

4.0 Reports and Patients Lists

This section contains instructions on running the CRS reports and patient lists. The CRS GUI contains all of the reports available in the CHUI version. See section 5.1 in the User Manual for descriptions of the reports and patient lists, content of the reports, and report formats.

1. From the Visual CRS window (Figure 2-2), click the **+** at the left of the CRS 2008-Version 8.0 folder to open the CRS 2008-Version 8.0 menu.

2. Click the **+** at the left of the Reports folder to open the Reports menu (Figure 4-1).

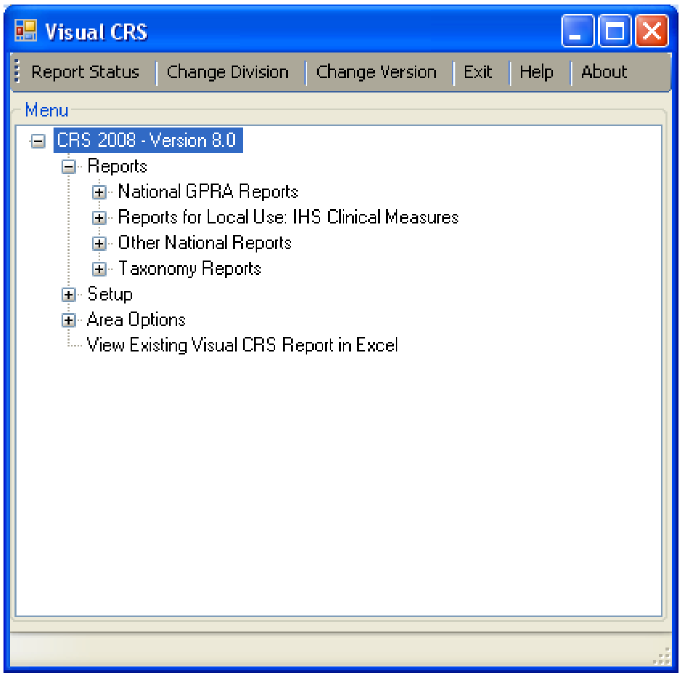

Figure 4-1: Reports Menu

4.1 National GPRA Reports

4.1.1 National GPRA Report

1. From the Reports Menu (Figure 4-1) click the **+** at the left of the National GPRA Reports folder to display the report options.

2. Click the National GPRA Report option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the

missing taxonomies before running the report. In either case, click OK to continue.

4. The National GPRA report window is displayed, as shown in Figure 4-2.

5. If you want to accept the default community, skip to step 9. To select a different community taxonomy, click the Select button.

6. The Taxonomies window is displayed. Select the desired community taxonomy by clicking the name of the taxonomy in the left frame of the window. You will know it is selected because it will be highlighted in blue.

7. Click the > arrow under the Select group to finish the selection. The taxonomy you selected will now be listed in the Taxonomies Selected group. If you wanted to remove the selected taxonomy, click the taxonomy in the right frame, then click the < button.

8. Click Save to save the selected community taxonomy. To close the window without saving the community taxonomy, click Close.

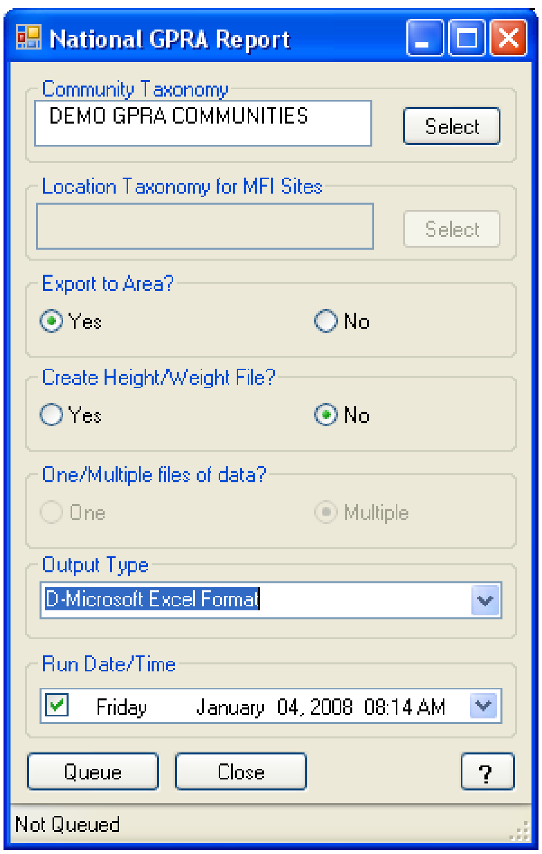

Figure 4-2: National GPRA Report Window

9. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

10. At Export to Area, click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button.

11. At Create Height/Weight File, click the Yes radio button if you would like to create a local copy of the height and weight data that will be included in the National GPRA export to the Area Office; otherwise, click No. If you click Yes, you will need to choose whether you want all of the data in one file or multiple files. If you choose one file and if there are more than 65,536 records, you will need to use an application other than Excel to open the file because Excel will truncate any records exceeding 65,536. **NOTE: If you choose not to create the local file, a file will not be created on your local server; however, the height and weight data will still be sent to your Area Office UNLESS the Height/Weight site parameter is set to "N". If your facility does want to export its height and weight data to the Division of Epidemiology, this site parameter should be set to "Y."** A copy of a letter addressed to Tribal Clinic Directors that discusses this data file in detail and explains how the information will be used is included in section 12 of the User Manual.

12. Select the report output type. The output options are defined below.

    - **P-Microsoft Word Format –** Creates a printed report that will be automatically opened in MS Word from the Check Report Status window (see section 1.0). You do not need to name this file before you run it, as it will be automatically assigned a name by the program.

    - **D-Microsoft Excel Format** – Creates a delimited file that will be automatically opened in MS Excel from the Check Report Status window. You do not need to name this file before you run it, as it will be automatically assigned a name by the program.

    - **B-Both Microsoft Word and Excel Format –** Creates both a printed report that will be automatically opened in MS Word and a delimited file that will be automatically opened in MS Excel from the Check Report Status window.

13. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the run time in Figure 4-2 from 01:04 to 3:00.

14. Click Queue to run the report or Close to close the window without running the report.

15. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 1.0 for information on checking the report status and opening them in Word and Excel.

4.1.2 National GPRA Report Patient List

1. From the Reports Menu (Figure 4-1), click the + at the left of the National GPRA Reports folder to display the report options.

2. Click the National GPRA Report Patient List option.

3. Information about the patient list is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The National GPRA Report Patient List window is displayed (Figure 4-3). Click the Select Measure(s) button at the top left to select the measures to be included in the report.

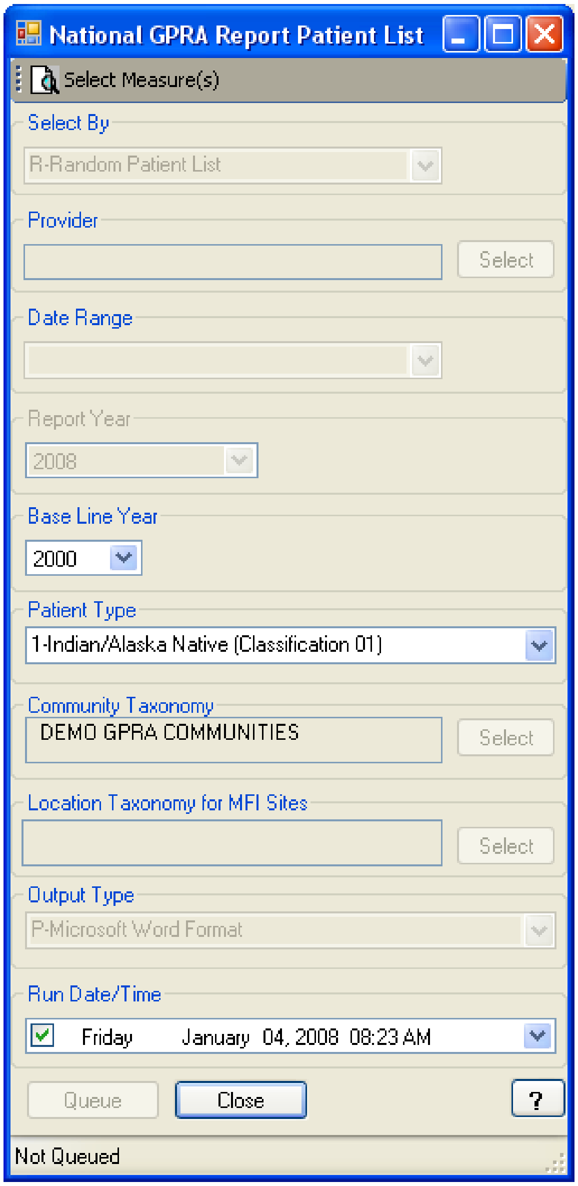

Figure 4-3: National GPRA Report Patient List Window

5. The Measures window is displayed. Select the performance measures for your report. The process for selecting the measures is the same as the process for selecting community taxonomy, as described in section 4.1.1, steps 6 - 8, except you are selecting measures, not a community.

6. Click OK at the message stating it will walk you through selecting patient lists for the measures you selected.

7. The available patient lists for the first measure you selected are displayed (Figure 4-4). Select the patient lists for the specified measure. The process for selecting the patient lists is the same as the process for selecting community taxonomy, as described in section 4.1.1, steps 6 - 8, except you are selecting patient lists, not taxonomies. The process will repeat for each measure you selected for the report.

Once the measure and patient list selection process is complete, you will be returned to the National GPRA Report Patient List window (Figure 4-3).

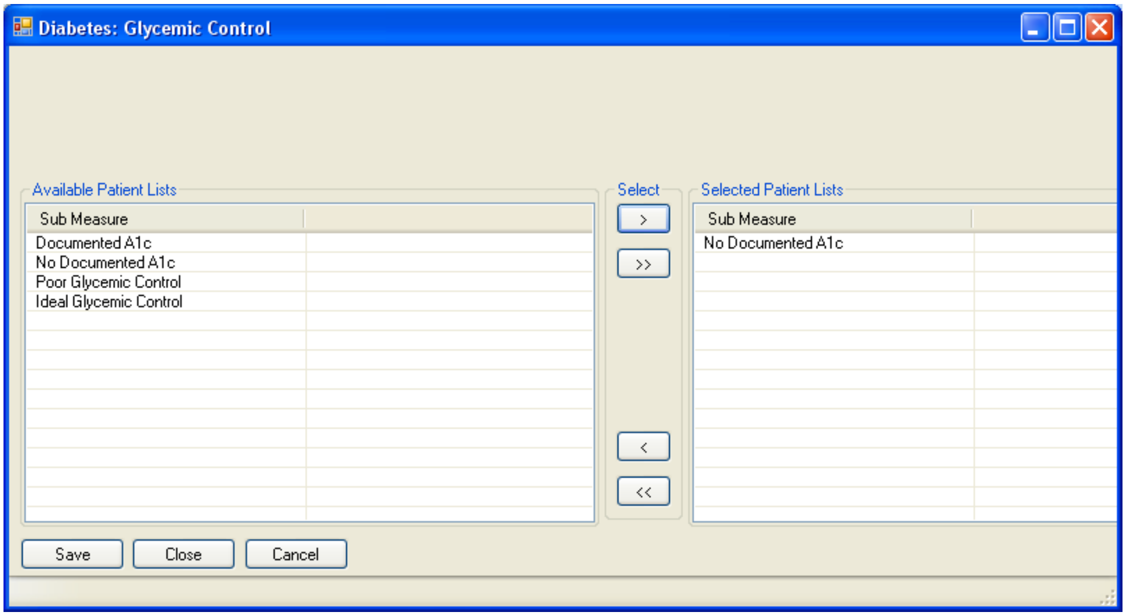

Figure 4-4: Selecting Patient Lists

8. At the National GPRA Report Patient List window (Figure 4-3), select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 – 8, except you are selecting a provider, not a location.

9. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

10. Select your baseline year by typing the 4-digit year into the box or clicking the list box down arrow to use the calendar.

11. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list.

12. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in 4.1.1, steps 6 - 8.

13. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

14. Select the report output type. Refer to section 4.1.1, step 12 for information on report output options.

15. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

16. Click Queue to run the report or Close to close the window without running the report.

17. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.1.3 Create Search Template for National Patient List

1. From the Reports Menu (Figure 4-1), click the + at the left of the National GPRA Reports folder to display the report options.

2. Click the Create Search Template for National Patient List option.

3. Information about the search template is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Search Template for NPL window is displayed (Figure 4-5). Click the Select Measure(s) button at the top left to select the measure from which to create the search template.

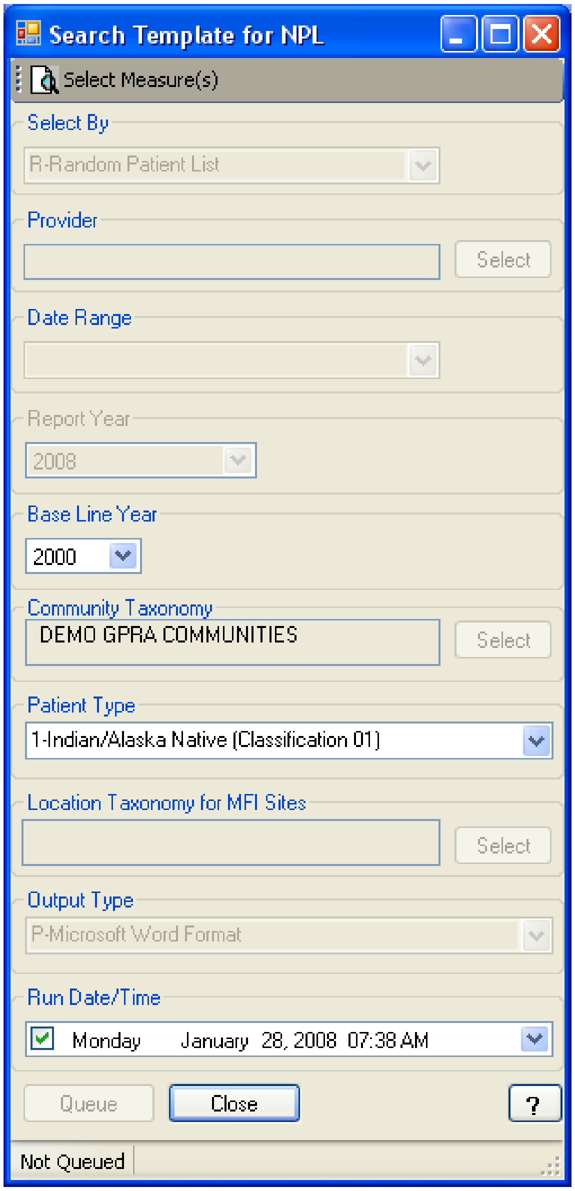

Figure 4-5: Search Template for NPL Window

5. The Measures window is displayed. Select the performance measure for your report. Only one measure may be selected for the search template. The process for selecting the measure is the same as the process for selecting community taxonomy, as described in section 4.1.1, steps 6 - 8, except you are selecting a measure, not a community.

6. Click OK at the message stating it will walk you through selecting patient lists for the measures you selected.

7. The available patient lists for the measure you selected are displayed (Figure 4-4). You may select only one patient list for the search template. Select the patient list for the specified measure. The process for selecting the patient list is the same as

the process for selecting community taxonomy, as described in section 4.1.1, steps 6 - 8, except you are selecting a patient list, not taxonomies.

8. The Search Templates window is displayed (Figure 4-6).

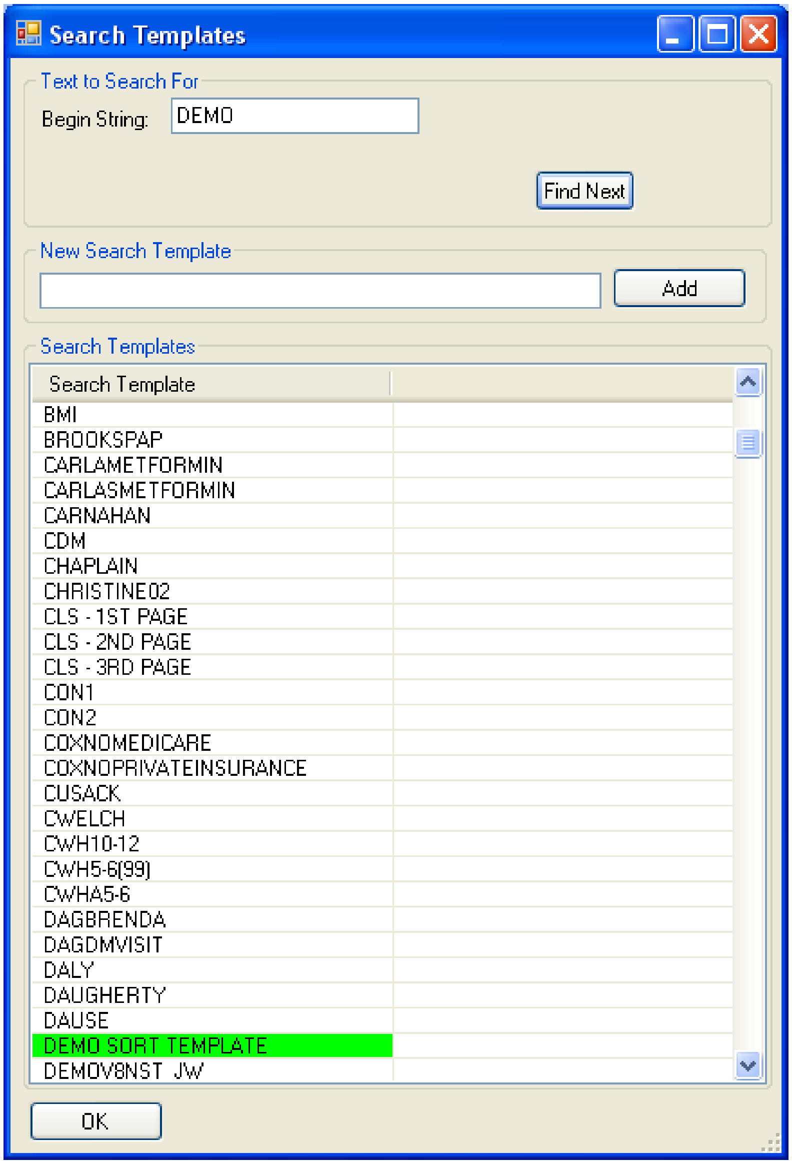

Figure 4-6: Searching for Existing Search Templates

9. The names of all existing search templates are displayed in alphabetical order. You may either create a new search template or save it to an existing search template. If you want to create a new search template, type the name of the search template in the New Search Template box. If you want to overwrite an existing search template, click the template to be overwritten from the list of existing search templates. You may search for an existing search template by typing the text to search for in the Begin String box. Click Find Next and the first template containing the text is highlighted in green, as shown in the figure.

10. Click Add to add a new search template. If you want to overwrite an existing search template, select the template name and click OK. A message will be displayed asking you to confirm you want to add/overwrite the existing template. Click Yes to add/overwrite or No to cancel.

11. At the Search Template for NPL window (Figure 4-5), the name of the search template will now be displayed in the bottom right corner. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 4.1.1, steps 6 - 12, except you are selecting a provider, not a location.

12. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

    If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

    If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

13. Select your baseline report year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

14. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section 4.1.1, steps 6 - 8.

15. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list.

16. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

17. Select the report output type. Refer to section 4.1.1, step 12 for information on report output options.

18. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

19. Click Queue to run the report or Close to close the window without running the report.

20. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 1.0 for information on checking the report status and opening them in Word and Excel.

4.1.4 GPRA Measure Forecast Patient List

1. From the Reports Menu (Figure 4-1), click the + at the left of the National GPRA Reports folder to display the report options.

2. Click the National GPRA Measure Forecast Patient List option.

3. Information about the patient list is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The National GPRA Measure Forecast Patient List window is displayed (Figure 4-7). Click the Select By drop down at the top to select the display criteria for the report.

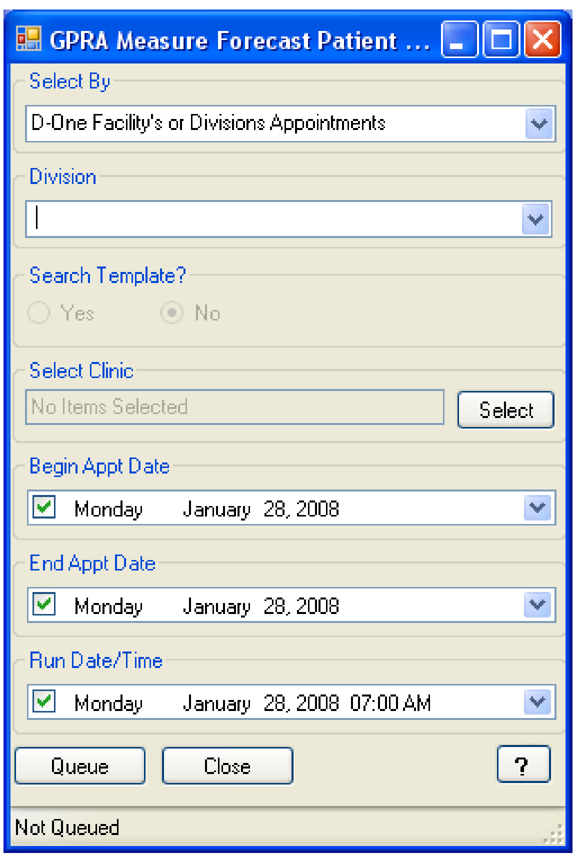

Figure 4-7: National GPRA Measure Forecast Patient List Window

5. Depending on your selection in step 4, you will also need to select a clinic, division, or patient in the appropriate field.

   - If you are selecting by clinic, continue to step 6.
   - If you are selecting by division, skip to step 7.
   - If you are selecting by patient with appointments, skip to step 8.
   - If you are selecting patient regardless of appointment status, skip to step 9.

6. **By Clinic**: Click the Select button in the Clinic field. The Clinic selection box will appear. Select your clinic by typing the name in the Begin String box and clicking Search. From the list that appears, click the clinic(s) you wish to select and click the > button. When finished, click the Save button to return to the Forecast Report definition screen. Skip to step 10.

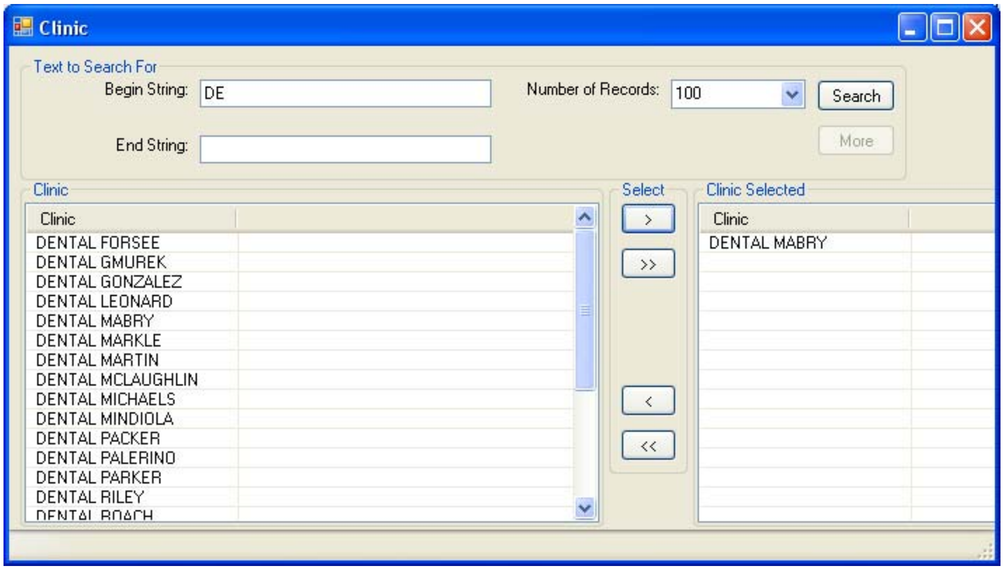

Figure 4-8: Selecting a clinic for the GPRA Forecast report

7. **By Division**: A Division field will appear beneath the Select By field. Click the dropdown arrow in the Division field to see a list of available divisions and select the one you want to report on. Skip to step 10.

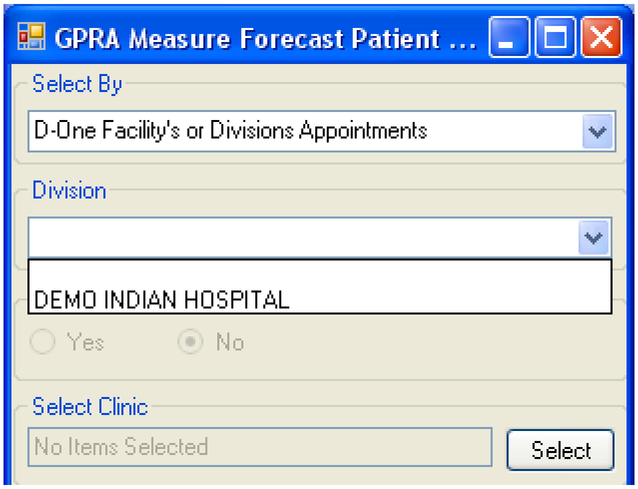

Figure 4-9: Selecting a division for the GPRA Forecast report

8. **By Patient with Appointments**: Click the Select button in the Select Patient field. The patient selection box will appear. Select your patient by typing his/her last name in the Begin String box and clicking Display. From the list that appears, click the patient you wish to select and you will be returned to the Forecast Report definition screen. The name of your patient will now appear in the Select Patient field. Skip to step 10.

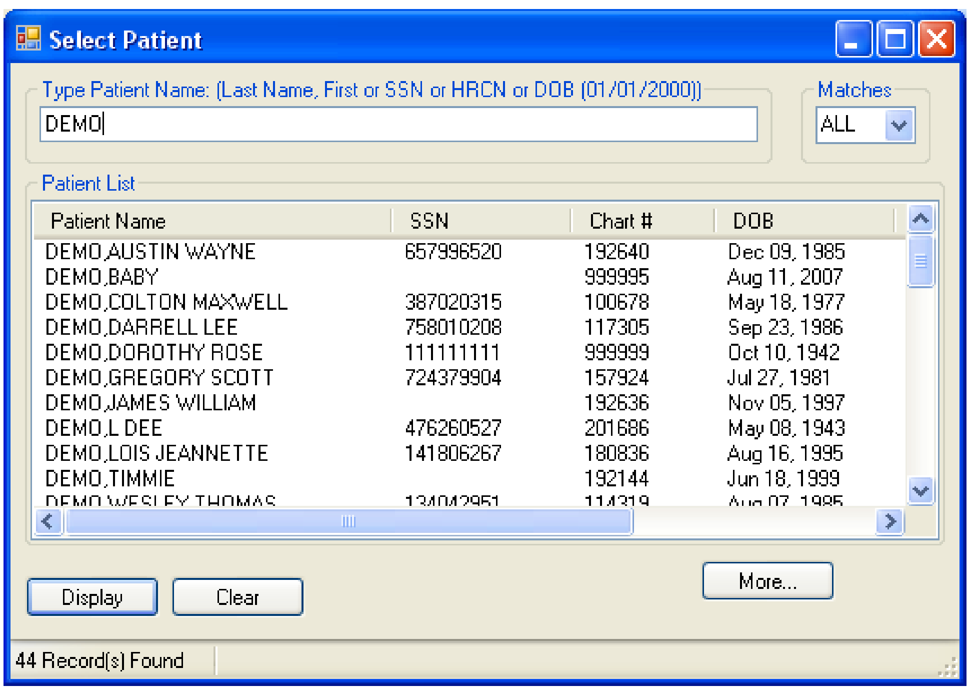

Figure 4-10: Selecting a patient for the GPRA Forecast report

9. **By Patient Set Regardless of Appointments**: Click the Select button in the Select Patient field. The patient selection box will appear. Select your patient by typing his/her last name in the Type Patient Name box and clicking Display. From the list that appears, click the patient(s) you wish to select and click the Add

One button. When your list is complete, click the Save button and you will be returned to the Forecast Report definition screen.

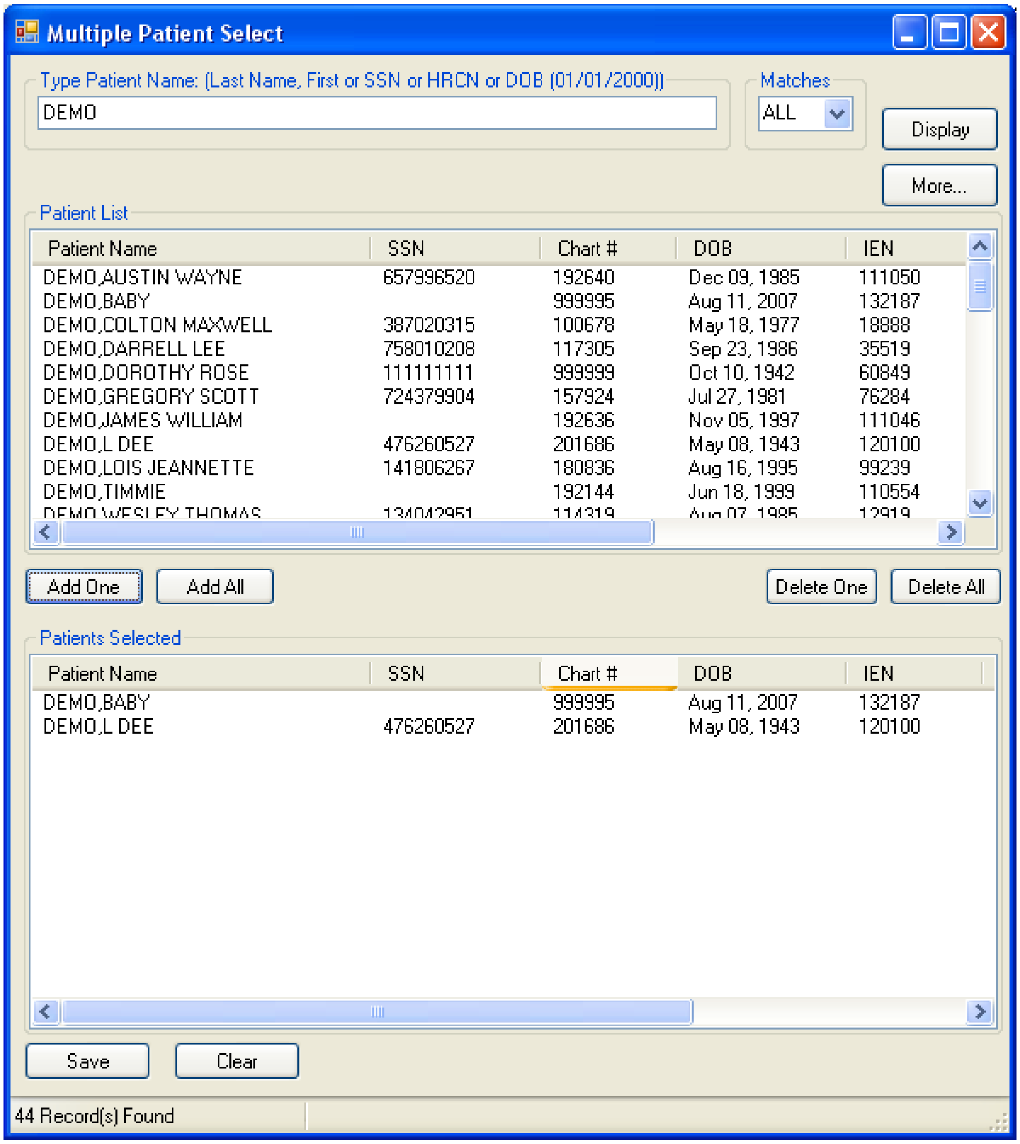

Figure 4-11: Selecting a patient set for the GPRA Forecast report

10. Click the Begin Appt Date drop down to select the beginning date for the report's appointment check criteria from the calendar.

11. Click the End Appt Date drop down to select the ending date for the report's appointment check criteria from the calendar.

12. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

13. Click Queue to run the report or Close to close the window without running the report.

14. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. This report can only be output in Word format. Refer to section 1.0 for information on checking the report status and opening them in Word.

4.1.5 GPRA Measure Forecast Denominator Definition Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the National GPRA Reports folder to display the report options.

2. Click the National GPRA Measure Denominator Definition option. The National GPRA Measure Forecast Denominator Definition window is displayed (Figure 4-12).

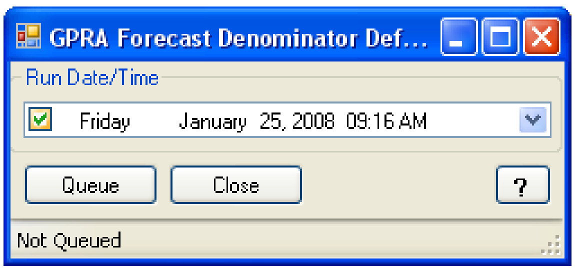

Figure 4-12: National GPRA Measure Forecast Patient List Window

3. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

4. Click Queue to run the report or Close to close the window without running the report.

5. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. This report can only be output in Word format. Refer to section 1.0 for information on checking the report status and opening them in Word.

4.1.6 Comprehensive National GPRA Patient List

1. From the Reports Menu (Figure 4-1), click the + at the left of the National GPRA Reports folder to display the report options.

2. Click the Comprehensive National GPRA Patient List option.

3. Information about the patient list is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they

have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Comprehensive National GPRA Patient List window is displayed (Figure 4-13). Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 12, except you are selecting a provider, not a location.

5. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

6. Select your baseline year by typing the 4-digit year into the box or clicking the list box down arrow to use the calendar.

7. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list.

8. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section 4.1.1, steps 6 - 8.

9. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

10. Select the report output type. Refer to section 4.1.1, step 12 for information on report output options.

11. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

12. Click Queue to run the report or Close to close the window without running the report.

13. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

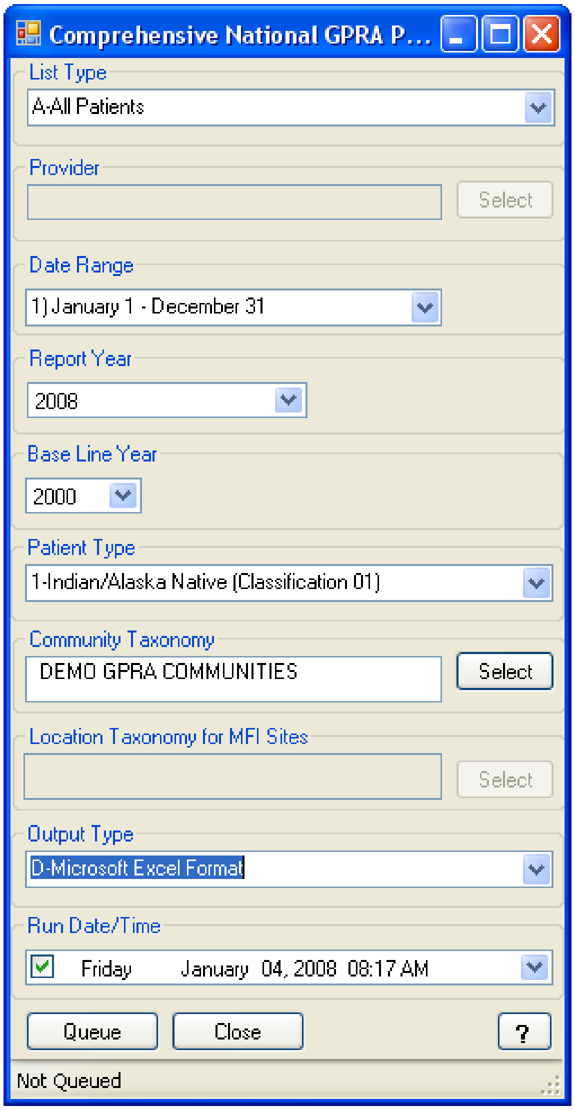

Figure 4-13: Comprehensive National GPRA Patient List Window

4.2 Reports for Local Use: IHS Clinical Measures

4.2.1 Selected Measures with Community Specified Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Reports for Local Use: IHS Clinical Measures folder to display the report options.

2. Click the Selected Measures w/Community Specified option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and

populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Selected Measures w/Community window is displayed (Figure 4-14).

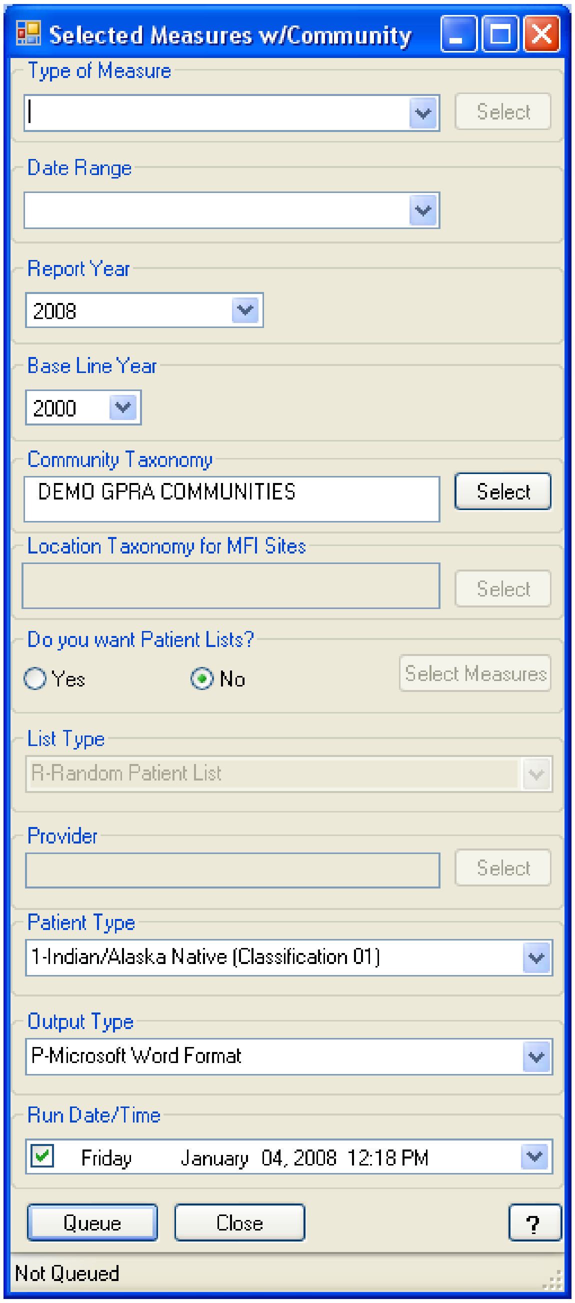

Figure 4-14: Selected Measures w/Community Window

5. Select the measures for the report from the Type of Measure list box. You may choose from one of the predefined groups of measures, such as Diabetes-Related Measures, or to select your own measures for the report (User Defined).

6. If you chose the Selected Measures (User Defined) option, click the Select button to select the measures using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

7. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

8. Select your baseline year by typing the 4-digit year into the box or clicking the list box down arrow to use the calendar.

9. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section section 4.1.1, steps 6 - 8.

10. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

11. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 14.

12. If you selected to include patient lists, click the Select Measures button. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

13. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

14. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

14. Select the report output type. Refer to section section 4.1.1, step 12 for information on report output options.

15. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

16. Click Queue to run the report or Close to close the window without running the report.

17. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.2.2 Selected Measures w/Patient Panel Population Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Reports for Local Use: IHS Clinical Measures folder to display the report options.

2. Click the Selected Measures w/Patient Panel option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Selected Measures w/Patient Panel window is displayed (Figure 4-15).

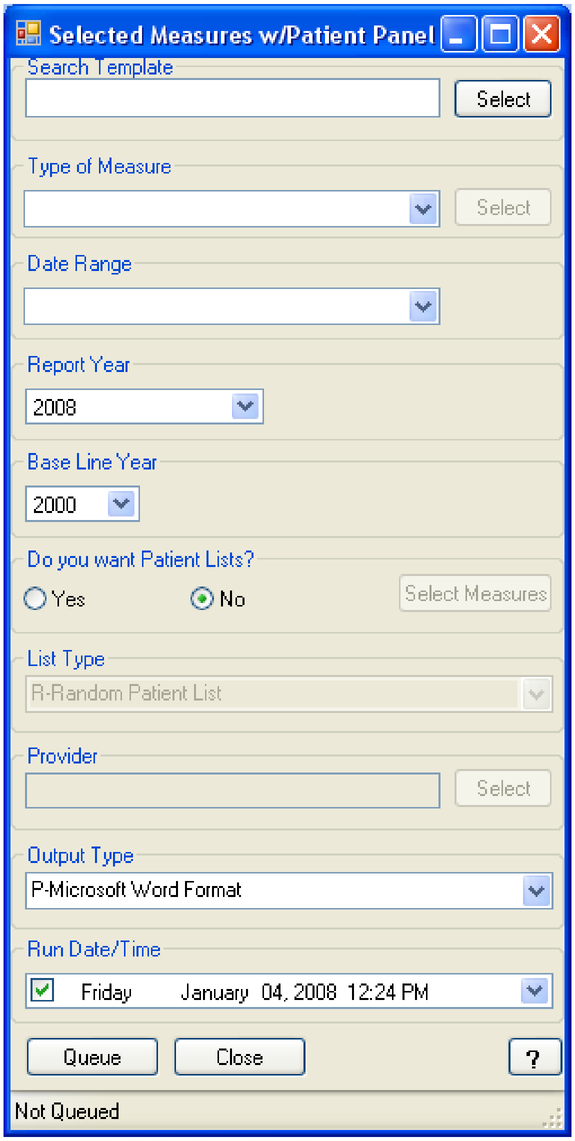

Figure 4-15: Selected Measures w/Patient Panel Window

5. Click the Select button to select the search template (i.e. patient panel) for the report using the same process as described in section 3.1, steps 6 - 8, except you are selecting a search template, not a location.

6. Select the measures for the report from the Type of Measure list box. You may choose from one of the predefined groups of measures, such as Diabetes-Related Measures, or to select your own measures for the report (User Defined). If you chose the Selected Measures (User Defined) option, click the Select button to select the measures using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

7. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

8. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

9. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 13.

10. Click the Select Measures button next to the Patient List radio buttons. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

11. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you select By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

12. Select the report output type. Refer to section section 4.1.1, step 12 for information on report output options.

13. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

14. Click Queue to run the report or Close to close the window without running the report.

15. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 1.0 for information on checking the report status and opening them in Word and Excel.

4.2.3 Selected Measures w/All Communities Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Reports for Local Use: IHS Clinical Measures folder to display the report options.

2. Click the Selected Measures w/All Communities option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated,

a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Selected Measures w/All Communities window is displayed (Figure 4-16).

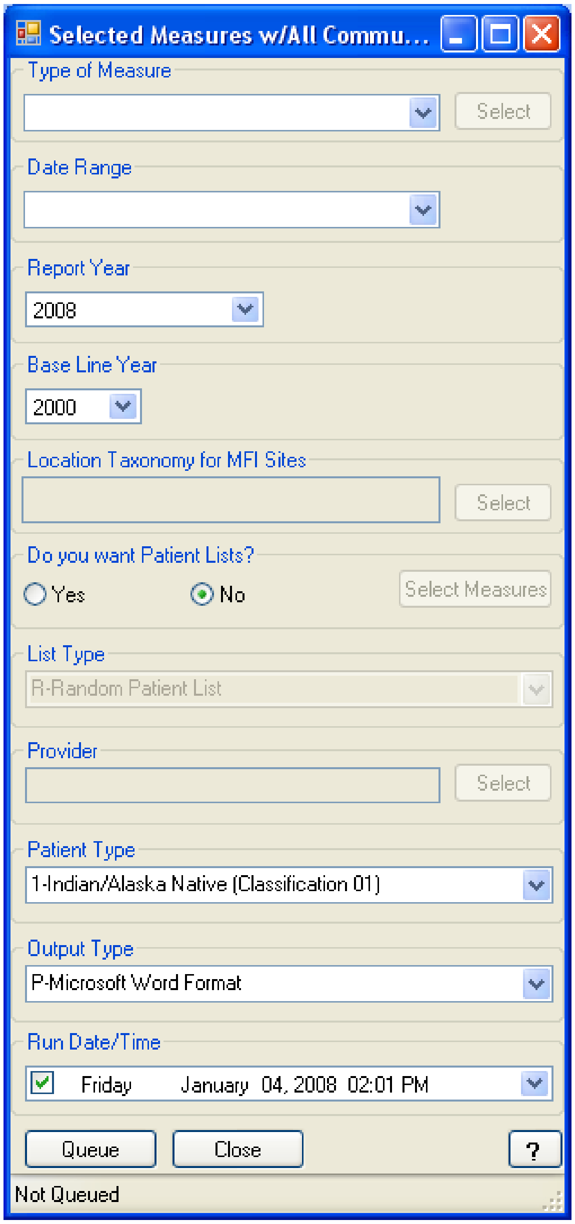

Figure 4-16: Selected Measures w/All Communities Window

5. Select the measures for the report from the Type of Measure list box. You may choose from one of the predefined groups of measures, such as Diabetes-Related Measures, or to select your own measures for the report (User Defined). If you chose the Selected Measures (User Defined) option, click the Select button to

select the measures using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

6. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

7. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

8. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

9. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 13.

10. Click the Select Measures button next to the Patient List radio buttons. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

11. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

12. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

13. Select the report output type. Refer to section section 4.1.1, step 12 for information on report output options.

14. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

15. Click Queue to run the report or Close to close the window without running the report.

16. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.2.4 CMS Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Reports for Local Use: IHS Clinical Measures folder to display the report options.
2. Click the CMS Performance Report option.
3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.
4. The CMS Performance Report window is displayed (Figure 4-17).

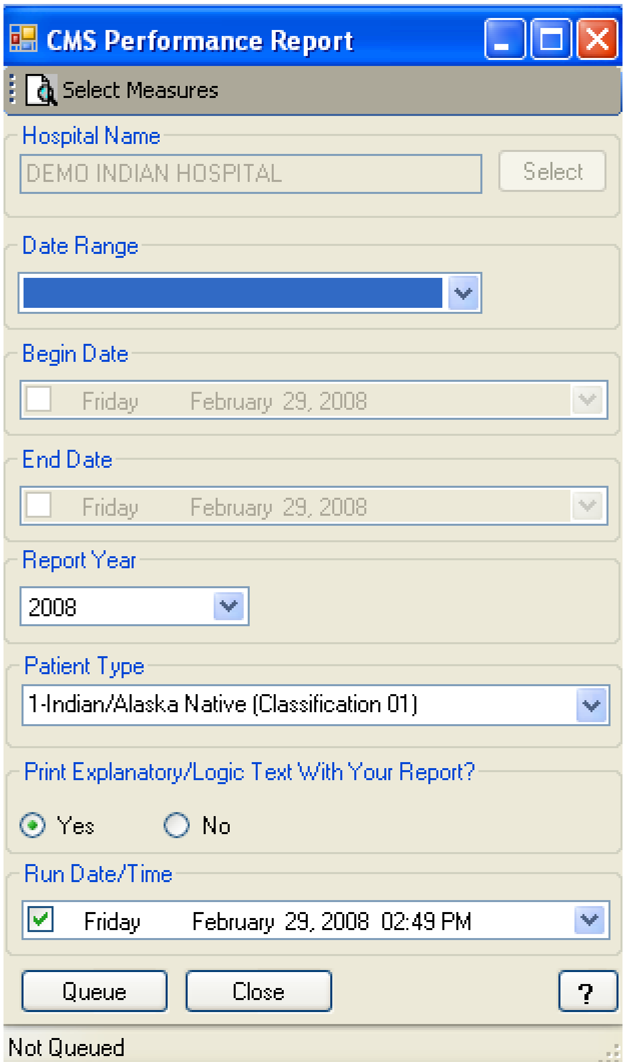

Figure 4-17: CMS Performance Report Window

5. Click the Select Measures button to choose the measures for the report using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

6. Click OK at the message stating it will walk you through selecting patient lists for the measures you selected.

7. The available patient lists for the first measure you selected are displayed. Select the patient lists for the specified measure. The process for selecting the patient lists is the same as the process for selecting community taxonomy, as described in section section 4.1.1, steps 6 - 8, except you are selecting patient lists, not taxonomies. The process will repeat for each measure you selected for the report. Once the measure and patient list selection process is complete, you will be returned to the CMS Report queue window.

8. Accept the default hospital name or enter a different one by clicking the Select button and using the same process as described in section 3.1, steps 6 - 8, except you are selecting a hospital, not a location.

9. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the Begin Date and End Date list box down arrows to use the calendar to select the beginning and ending dates for the report. Or, click the checkbox in the Begin Date and End Date boxes, then click the month, day, or year value to be changed, and move the up or down arrows to change the values.

> **NOTE:** There is no delimited output option for this report. All reports will be imported into Word.

10. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list.

11. If you would like to print explanatory/logic data with the report, make sure the "Yes" radio button is checked.

12. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

13. Click Queue to run the report or Close to close the window without running the report.

14. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening it in Word.

4.3 Other National Reports

4.3.1 GPRA Performance Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the GPRA Performance Report option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The GPRA Performance Report window is displayed (Figure 4-18).

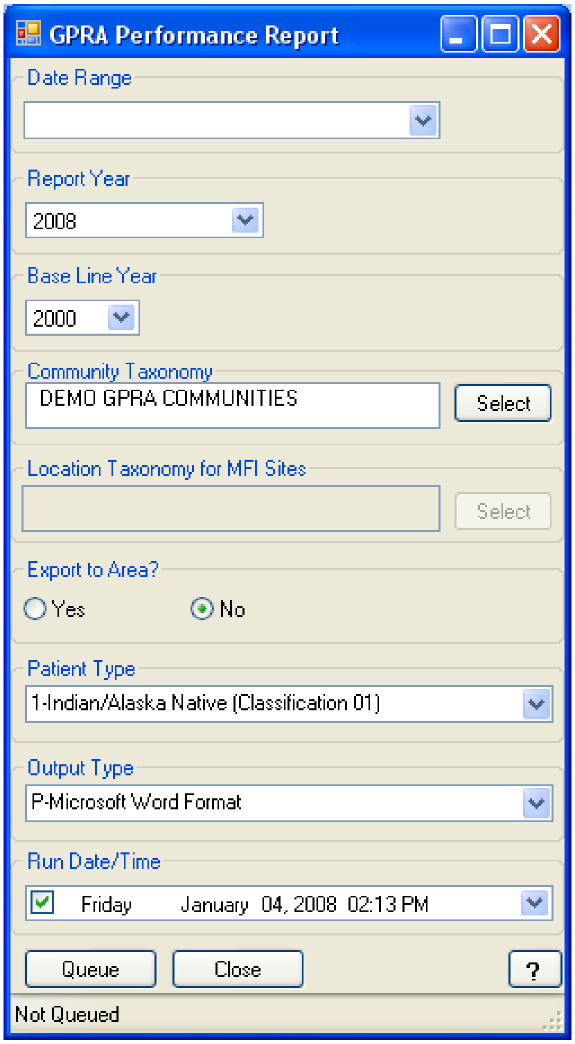

Figure 4-18: GPRA Performance Report Window

5. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report <u>end date</u>. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

6. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

7. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section section 4.1.1, steps 6 - 8.

8. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

9. Click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button.

10. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

11. Select the report output type. Refer to section section 4.1.1 step 12 for information on report output options.

12. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

13. Click Queue to run the report or Close to close the window without running the report.

14. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.3.2 Other National Measures Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the Other National Measures Report option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies

are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Other National Measures Report window is displayed (Figure 4-19).

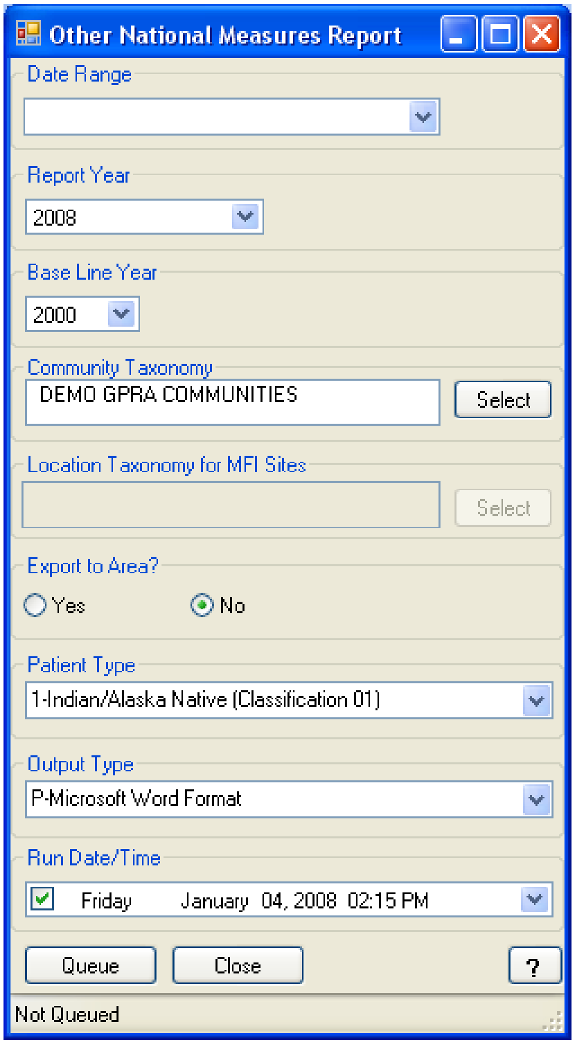

Figure 4-19: Other National Measures Report Window

5. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report <u>end date</u>. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report <u>end date</u>. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

6. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

7. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section section 4.1.1, steps 6 - 8.

8. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

9. Click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button.

10. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

11. Select the report output type. Refer to section section 4.1.1 step 12 for information on report output options.

12. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

13. Click Queue to run the report or Close to close the window without running the report.

14. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.3.3 Other National Measures Patient List

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the Other National Measures Patient List option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Other National Measures Patient List window is displayed (Figure 4-20). Click the Select Measure(s) button at the top left to select the measures to be included in the report.

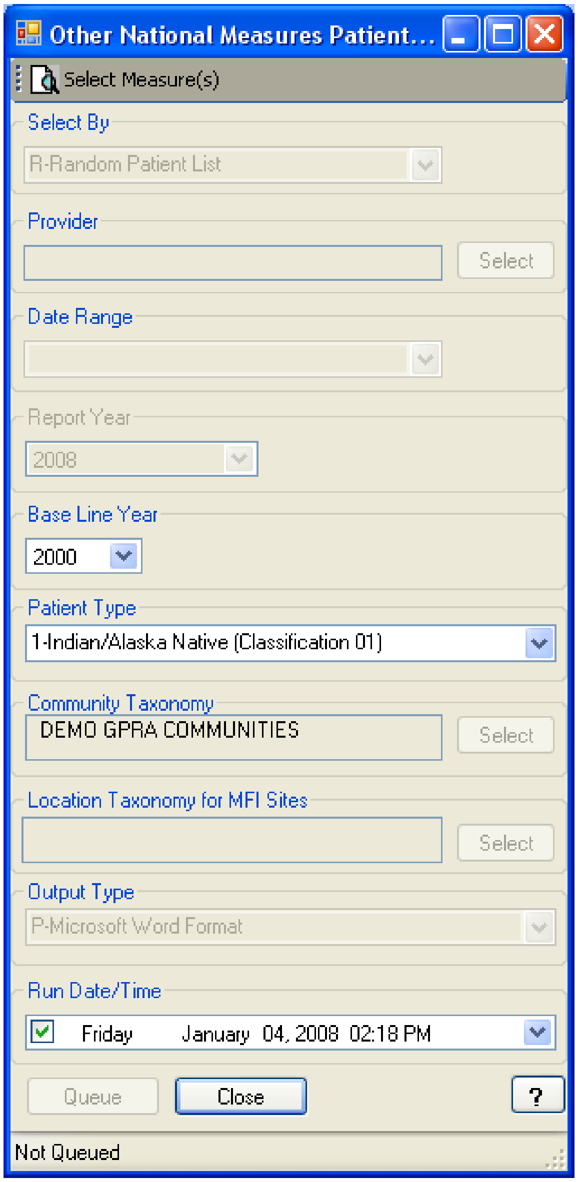

Figure 4-20: Other National Measures Patient List Window

5. The Measures window is displayed. Select the performance measures for your report. The process for selecting the measures is the same as the process for selecting community taxonomy, as described in section section 4.1.1, steps 6 - 8, except you are selecting measures, not a community.

6. Click OK at the message stating it will walk you through selecting patient lists for the measures you selected.

7. The available patient lists for the first measure you selected are displayed. Select the patient lists for the specified measure. The process for selecting the patient lists is the same as the process for selecting community taxonomy, as described in section section 4.1.1, steps 6 - 8, except you are selecting patient lists, not taxonomies. The process will repeat for each measure you selected for the report. Once the measure and patient list selection process is complete, you will be returned to the Other National Measures Patient List window (Figure 4-20).

8. At the Other National Measures Patient List window, select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

9. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report <u>end date</u>. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report <u>end date</u>. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

10. Select your report year by typing the 4-digit year into the Report Year box or clicking the list box down arrow to use the calendar.

11. Select your baseline year by typing the 4-digit year into the box or clicking the list box down arrow to use the calendar.

12. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

13. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in 4.1.1, steps 6 - 8.

14. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

15. Select the report output type. Refer to section section 4.1.1 step 12 for information on report output options.

16. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

17. Click Queue to run the report or Close to close the window without running the report.

18. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.3.4 Elder Care Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the Elder Care Report option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The Elder Care Report window is displayed (Figure 4-21).

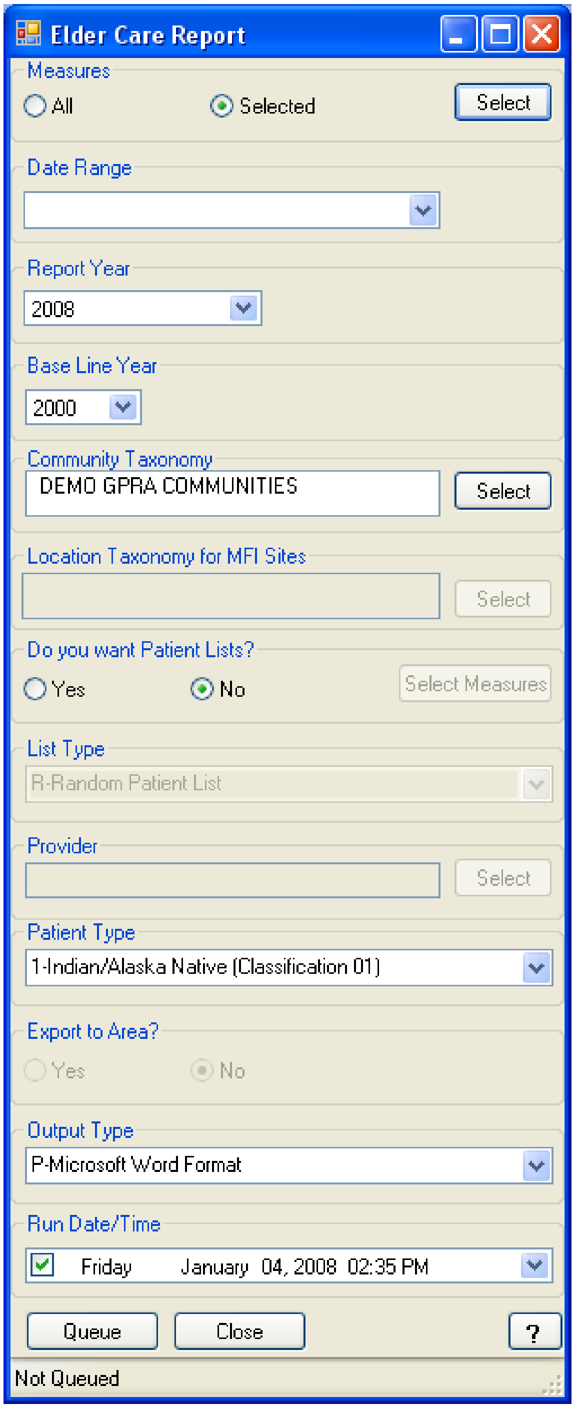

Figure 4-21: Elder Care Report Window

5. Click the **All** radio button to select all Elder Care measures for the report <u>OR</u> click the **Selected** radio button to choose the measures to be included in the report. If you chose the Selected option, click the **Select** button to select the measures for the report using the same process as described in section section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

6. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

7. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

8. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section section 4.1.1, steps 6 - 8.

9. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

10. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 13.

11. If you selected to include patient lists, click the Select Measures button. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

12. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

13. Select the Patient Type (i.e. include only AI/AN patients, non-AI/AN patients, or both).

14. Click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button. **NOTE: This option will only be available if you selected all measures for the report.**

15. Select the report output type. Refer to section 4.1.1, step 12 for information on report output options.

16. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

17. Click Queue to run the report or Close to close the window without running the report.

18. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.3.5 HEDIS Performance Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the HEDIS Performance Report option.

3. Information about the report is displayed and the software checks the taxonomies for the report. If your taxonomies for the report have all been setup and populated, a message stating all taxonomies are present is displayed. If they have not all been setup and populated, then a message stating one or more taxonomies are missing or have no entries will be displayed. See section 3.2.2 to setup the missing taxonomies before running the report. In either case, click OK to continue.

4. The HEDIS Performance Report window is displayed (Figure 4-22).

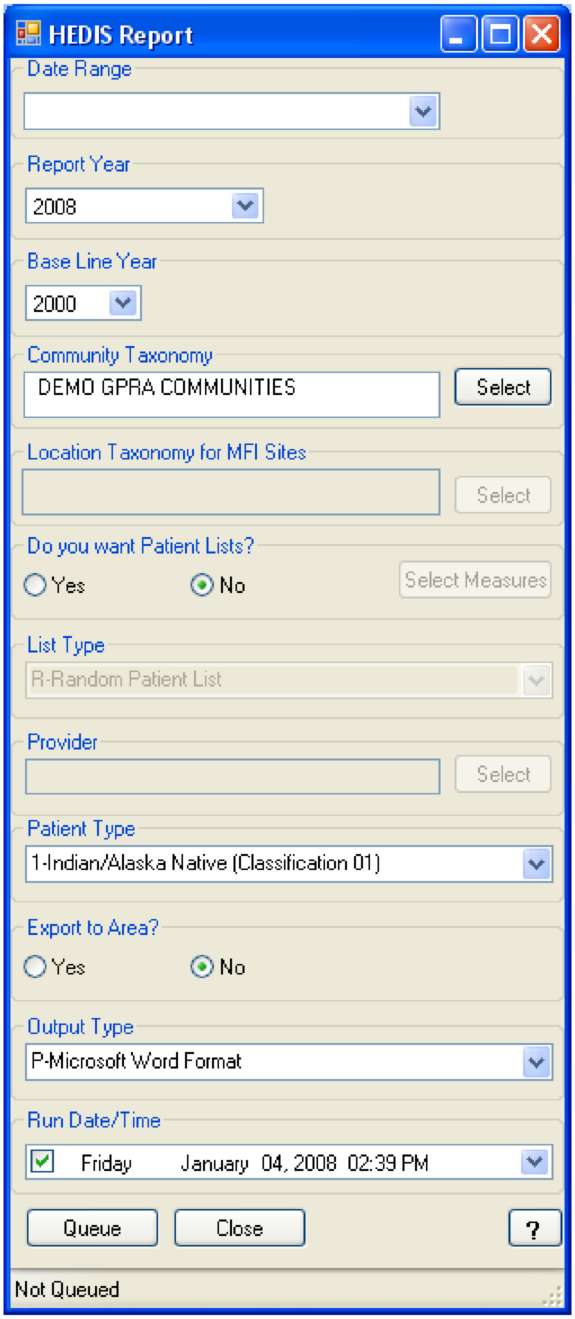

Figure 4-22: HEDIS Performance Report Window

5. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report <u>end date</u>. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report <u>end date</u>. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

6. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

7. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section 4.1.1, steps 6 - 8.

8. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

9. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 12.

10. If you selected to include patient lists, click the Select Measures button next to the Patient List rado buttons. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

11. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

12. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

13. Click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button.

14. Select the report output type. Refer to section 4.1.1 step 12 for information on report output options.

15. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

16. Click Queue to run the report or Close to close the window without running the report.

17. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.3.6 Patient Education Report

1. From the Reports Menu (Figure 4-1), click the + at the left of the Other National Reports folder to display the report options.

2. Click the Patient Education Report option.

3. Information about the report is displayed. Click OK to continue.

4. The Patient Education window is displayed (Figure 4-23).

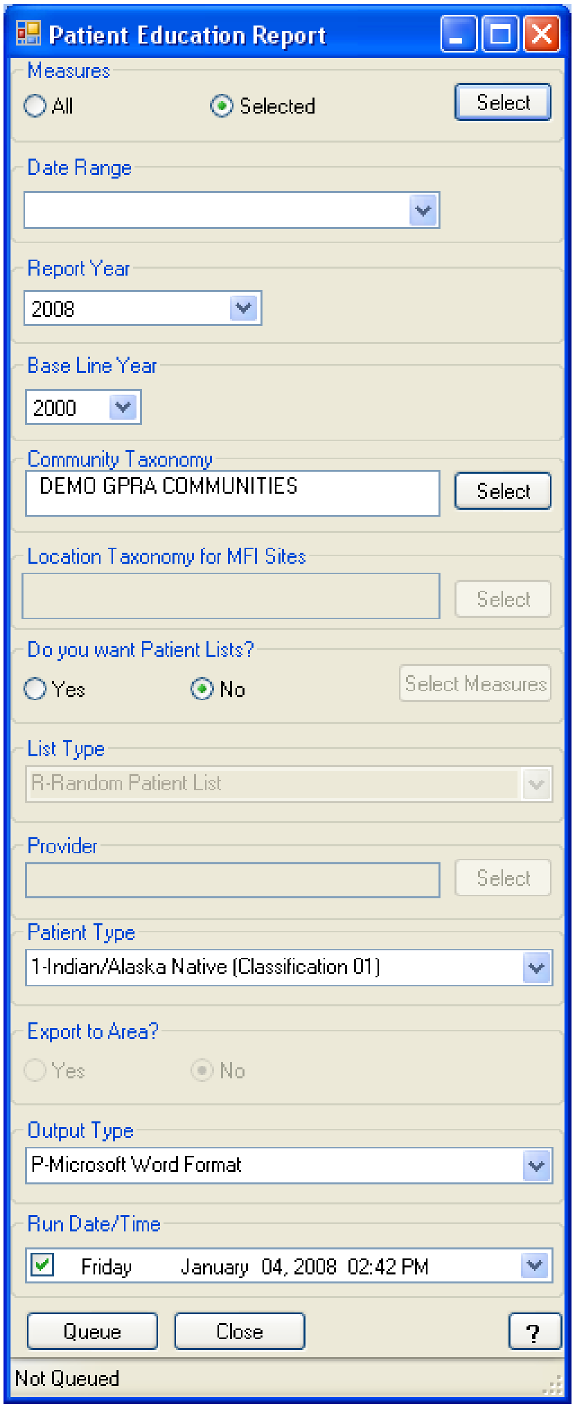

Figure 4-23: Patient Education Report Window

5. Click the **All** radio button to select all Patient Education measures for the report <u>OR</u> click the **Selected** radio button to choose the measures to be included in the report. If you chose the Selected option, click the **Select** button to select the measures for the report using the same process as described in section 4.1.1, steps 6 - 8 except you are selecting measures, not taxonomies.

6. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

7. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

8. The default community taxonomy is displayed in the Community Taxonomy list box. You may use this community or select a different community taxonomy, as described in section 4.1.1, steps 6 - 8.

9. The Select button for Location Taxonomy for MFI Sites is enabled only for facilities within the Alaska Area and no action is required for non-Alaska facilities.

10. Click the Yes radio button if you want to include patient lists for your report; otherwise, click the No button and skip to step 13.

11. If you selected to include patient lists, click the Select Measures button next to the Patient List radio buttons. The Patient List Measures window is displayed. Select the patient lists for your report by using the same process as described in section 4.1.1, steps 6 - 8 except you are selecting patient lists, not taxonomies.

12. Select the type of patient list you want to run (i.e. Random, By Provider, or All Patients). If you selected By Provider, click the Select button to select the provider using the same process as described in section 3.1, steps 6 - 8, except you are selecting a provider, not a location.

13. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

14. Click the Yes radio button if you are ready to send final data to your Area Office; otherwise, click the No radio button. **NOTE: This option will only be available if you selected all measures for the report.**

15. Select the report output type. Refer to section 4.1.1 step 12 for information on report output options.

16. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

17. Click Queue to run the report or Close to close the window without running the report.

18. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

4.4 Taxonomy Reports

4.4.1 Lab Taxonomy Reports

1. From the Reports Menu (Figure 4-1), click the + at the left of the Taxonomy Reports folder to display the taxonomy report options.

2. Click the + at the left of the Lab Taxonomy Report folder to display the Lab Taxonomy Report options.

3. There are 6 lab taxonomy report options, organized by the reports the taxonomies are used it (Figure 4-24). Click the name of the lab taxonomy report you wish to run.

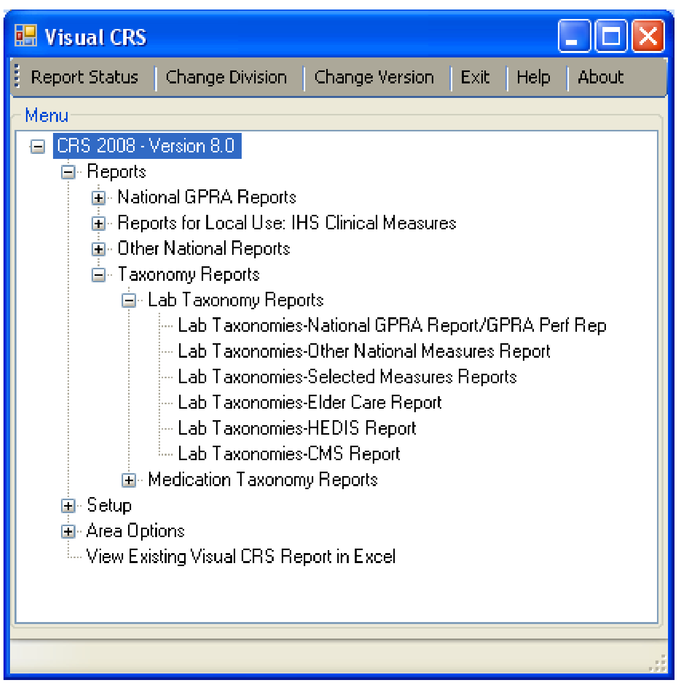

Figure 4-24: Lab Taxonomy Reports List

4. Information about the report is displayed. Click OK to continue.

5. The Lab Taxonomy Report window is displayed (Figure 4-25).

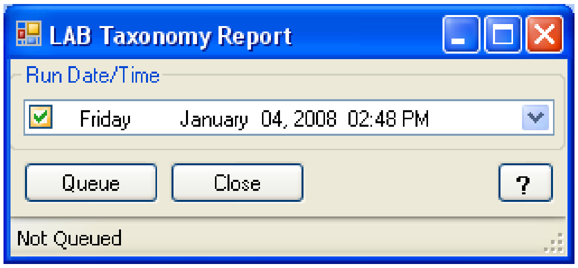

Figure 4-25: Lab Taxonomy Report Window

> **NOTE:** There is no delimited output option for this report. All reports will be imported into Word.

6. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

7. Click Queue to run the report or Close to close the window without running the report.

8. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening it in Word.

4.4.2 Medication Taxonomy Reports

1. From the Reports Menu (Figure 4-1), click the + at the left of the Taxonomy Reports folder to display the taxonomy report options.

2. Click the + at the left of the Medication Taxonomy Report folder to display the medication taxonomy report options.

3. There are 6 medication taxonomy report options, organized by the reports the taxonomies are used it (Figure 4-24). Click the name of the medication taxonomy report you wish to run.

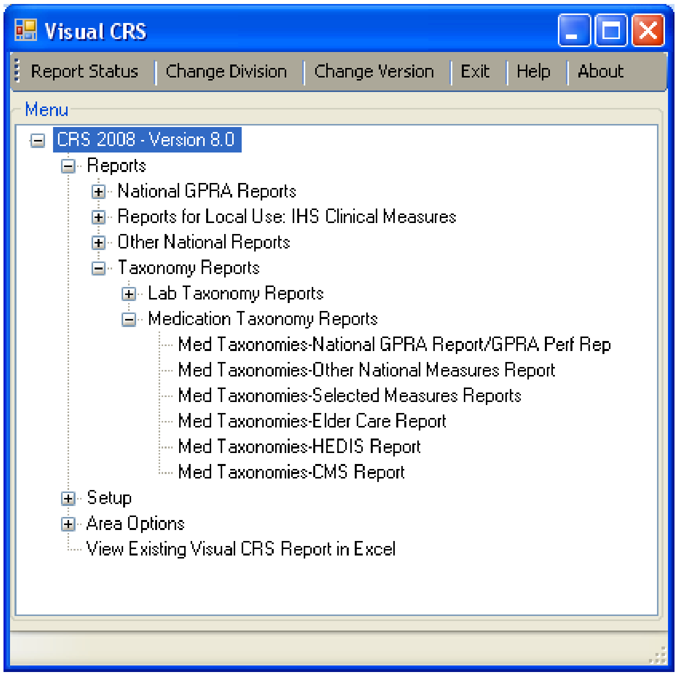

Figure 4-26: Medication Taxonomy Reports List

4. Information about the report is displayed. Click OK to continue.

5. The Medication Taxonomy Report window is displayed (Figure 4-27).

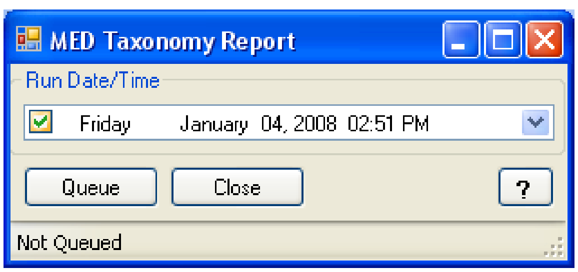

Figure 4-27: Medication Taxonomy Report Window

> **NOTE:** There is no delimited output option for this report. All reports will be imported into Word.

6. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

7. Click Queue to run the report or Close to close the window without running the report.

8. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening it in Word.

5.0 Area Options

This section contains instructions for Area Office users for uploading the facility report files and running the CRS Area Aggregate reports. The CRS GUI contains all of the Area Office reports available in the CHUI version. See section 6.0 in the User Manual for descriptions of the Area options.

1. From the Visual CRS window (Figure 2-2), click the **+** at the left of the CRS 2008-Version 8.0 folder to open the CRS 2008-Version 8.0 menu.

2. Click the **+** at the left of the Area Options folder to open the Area Options menu, as shown in Figure 5-1. **NOTE: The Area Options menu is only displayed for users with the BGPZAREA security key.**

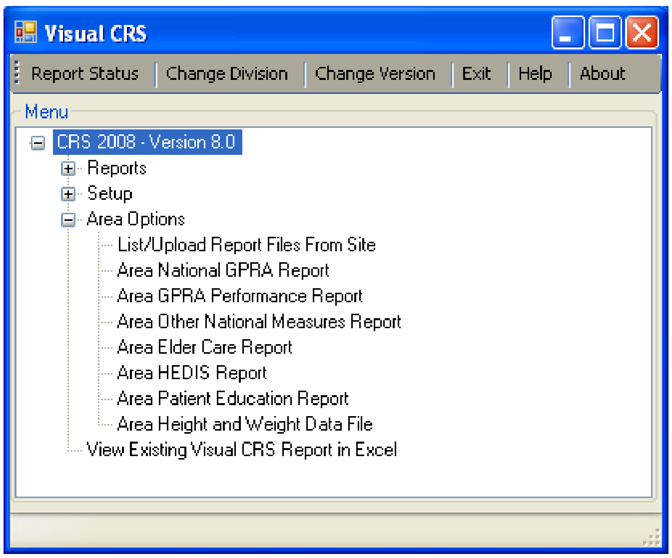

Figure 5-1: Area Options Menu

5.1 List/Upload Report Files From Site

1. From the Area Options Menu (Figure 5-1), click the List/Upload Report Files From Site option.

2. The Upload Files window is displayed (Figure 5-2).

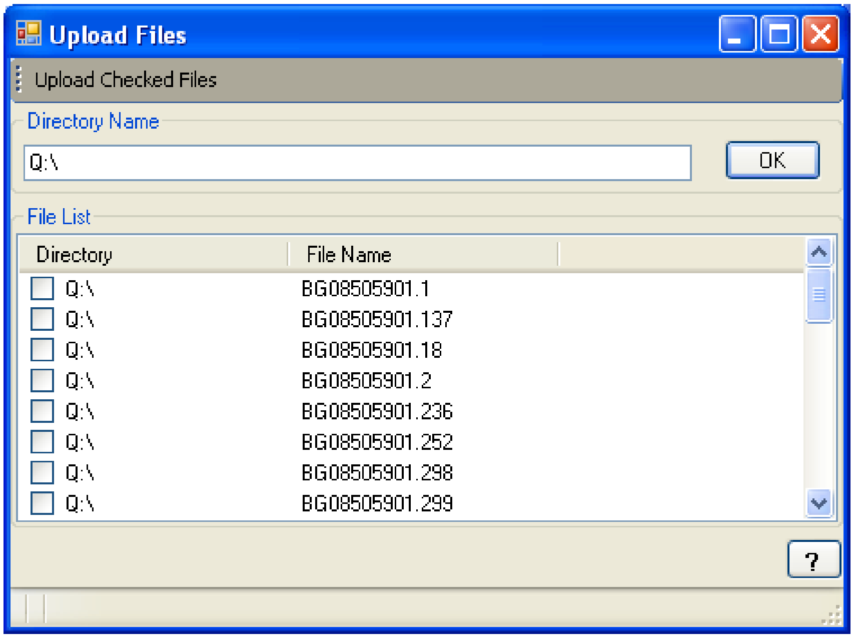

Figure 5-2: Upload Files Window

3. Type the appropriate directory name in the Directory Name box. This should be the Area network directory to which the facilities' data files have been sent via FTP (File Transfer Protocol).

4. Click OK.

5. A list of files will be displayed, as shown in (Figure 5-2). Only FileMan data files created by CRS 2008 (BGP v.8.*) will be listed. File names begin with "BG08" and are followed by the six-digit ASUFAC code for the facility that created and transmitted the file. Files with an extension of ".ONM" are Other National Measures reports, files with an extension containing ".HE" are HEDIS reports, files with an extension of ".EL" are Elder Care reports, and files with an extension of ".PED" are Patient Education reports. GPRA Performance reports are treated the same as National GPRA reports and will be displayed with them, if they have a report period of July 1, 2007 – June 30, 2008, a baseline year of 2000, and a population of AI/AN only. These reports only have numbers in the file name extension. For example, the eight files shown in Figure 5-2 are National GPRA and GPRA Performance report files.

6. To upload a file, click the checkbox next to the desired file(s) and click the Upload Checked Files option in the top of the box. Once the file has been uploaded, "Files Uploaded Successfully" will be displayed in the status bar (lower left) of the window.

7. To exit the window, click the red X in the upper right corner.

5.2 Area National GPRA Report

For background information on this report and to view the sample cover page, sample Summary Page, and sample Clinical Performance Detail section, see section 6.2.1 in the User Manual.

1. From the Area Options Menu (Figure 5-1), click the Area National GPRA Report option.

2. The Area National GPRA Report window is displayed (Figure 5-3).

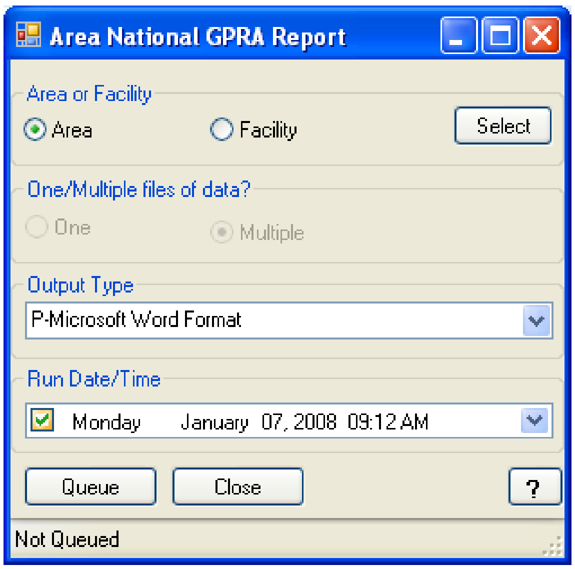

Figure 5-3: Area National GPRA Report Window

3. Click the Area radio button to run a report that combines the data for all sites within the Area or click the Facility radio button to run a report similar to the facility National GPRA report (see section 4.1.1.).

4. The Facilities window is displayed (Figure 5-4). All facilities that have had their data files uploaded for the National GPRA report are displayed.

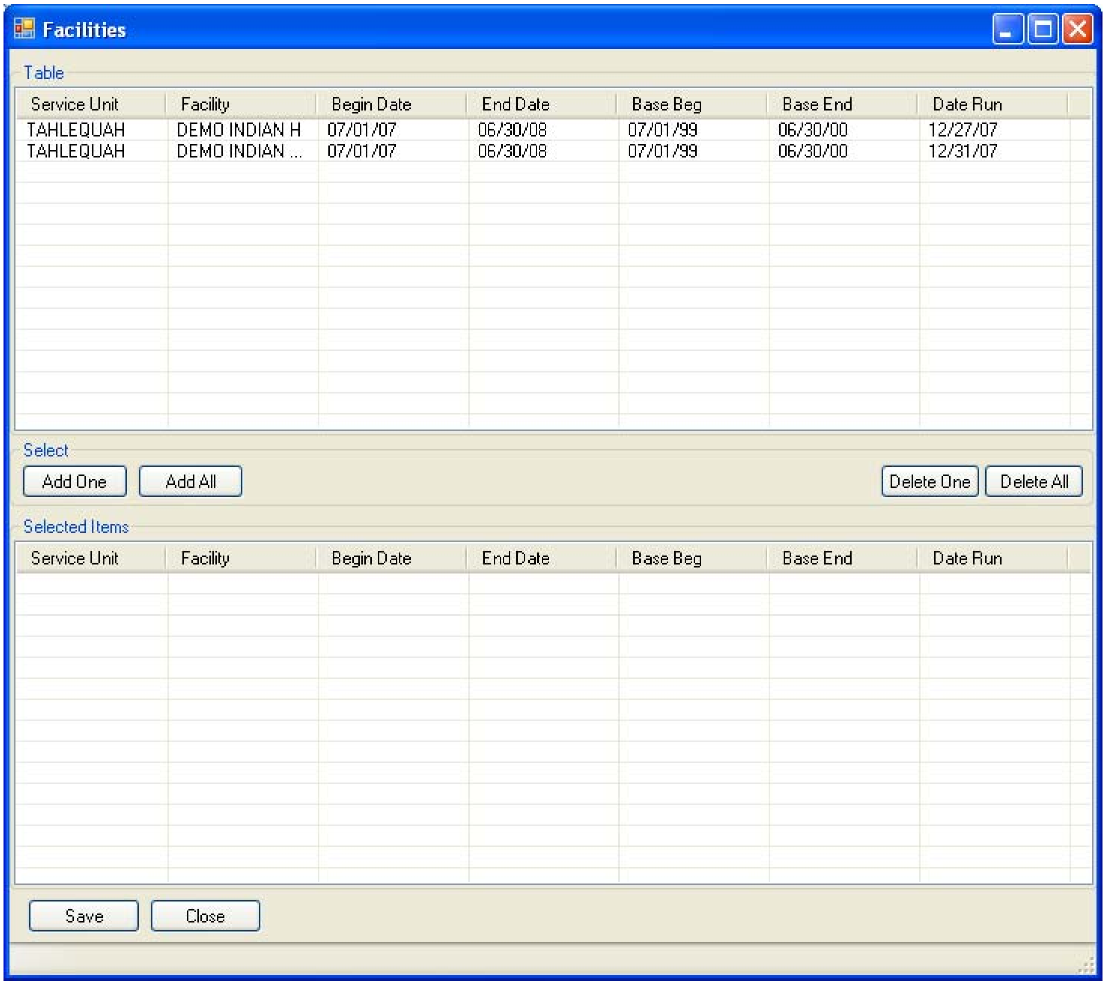

Figure 5-4: Facilities Window

5. To select the facilities to be included, click them, then click the Add One button. To select all listed facilities for the report, click the Add All button. To remove a facility from the Selected Items list, click the facility, then click the Delete One button. To remove all facilities from the Selected Items list, click the Delete All button.

6. Click the Save button when you are finished selecting facilities for the report.

7. Select the report output type. Refer to section 4.1.1, step 12 for information on report output options.

8. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

9. Click Queue to run the report or Close to close the window without running the report.

10. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

5.3 Area Aggregates for All Other Reports

The process for running the Area GPRA Performance, Area Other National Measures, Area Elder Care, Area HEDIS, and Area Patient Education reports is the same and will be discussed in this section. For demonstration purposes, the Area Elder Care report was run.

For background information on these reports, refer to section 6.2 in the User Manual.

1. From the Area Options Menu (Figure 5-1), click the desired report option (i.e. Area GPRA Performance Report, Area Other National Measures, Area Elder Care Report, Area HEDIS Report, or Area Patient Education Report).

2. Depending on the report selected, the Area GPRA Performance Report, Area Other National Measures, Area Elder Care Report, Area HEDIS Report, or the Area Patient Education Report window is displayed. For demonstration purposes, the Area Elder Care Report window is displayed (Figure 5-5).

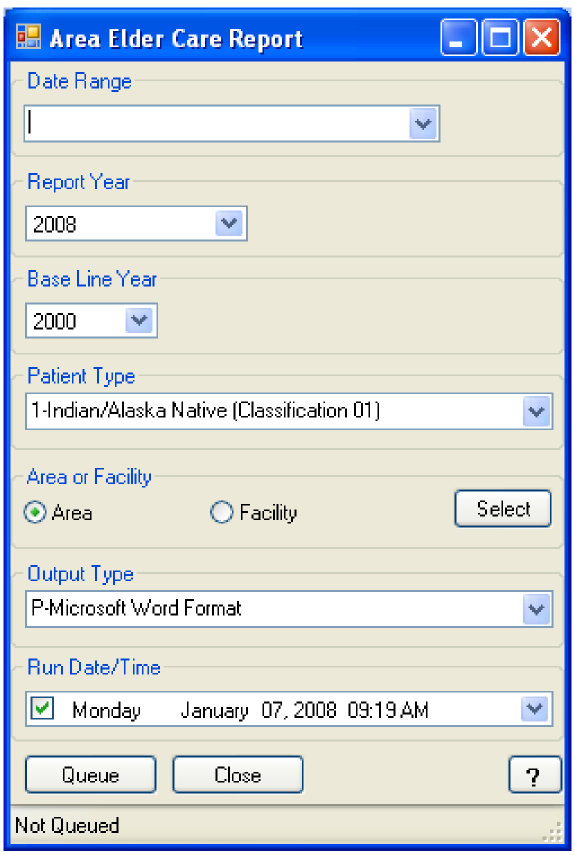

Figure 5-5: Area Elder Care Report Window

3. Select the date range for the report by selecting one of the predefined date ranges or selecting the User Defined Report Period option.

   If you selected a predefined date range, enter the year for the report end date. To change the default year, click in the Report Year box and move the up or down arrow on your keyboard to select the desired year.

   If you selected User Defined Report Period, click the list box down arrow to use the calendar to select a date for the report end date. Or, click the month/day/year value in the Report End box and move the up or down arrows to change the values.

4. Select your baseline year by typing the 4-digit year into the Base Line Year box or clicking the list box down arrow to use the calendar.

5. Select your patient type/ beneficiary population you want to include in your report from the Patient Type drop down list (i.e. include only AI/AN patients, non-AI/AN patients, or both).

6. Click the Area radio button to run a report that combines the data for all sites within the Area or click the Facility radio button to run a report similar to the facility report. The example here is an Area Aggregate report.

7. The Facilities window is displayed (Figure 5-6). All facilities that have had their data files uploaded that match the criteria for the report are displayed.

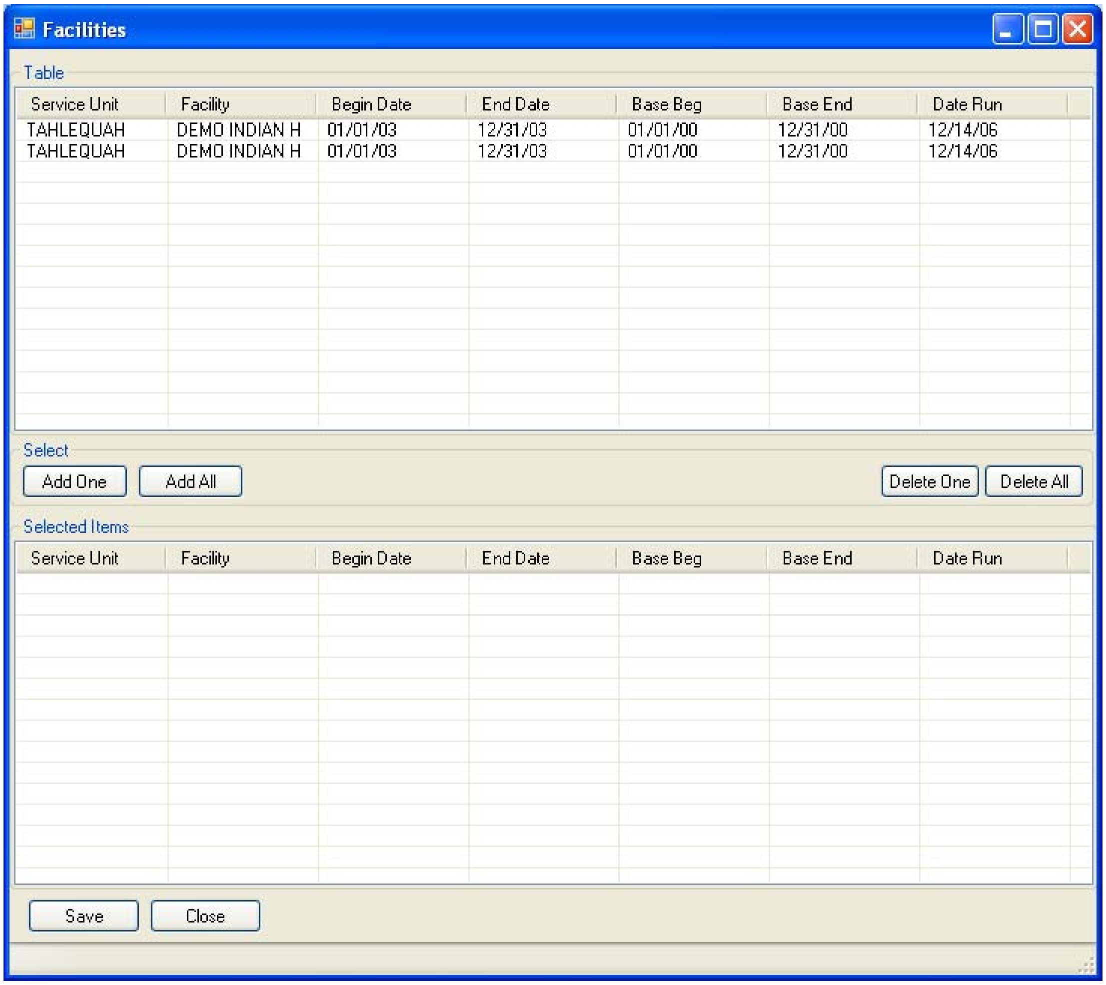

Figure 5-6: Facilities Window

8. To select the facilities to be included, click them, then click the Add One button. To select all listed facilities for the report, click the Add All button. To remove a facility from the Selected Items list, click the facility, then click the Delete One button. To remove all facilities from the Selected Items list, click the Delete All button.

9. Click the Save button when you are finished selecting facilities for the report.

10. Select the report output type. Refer to section 4.1.1 step 12 for information on report output options.

11. If you want to change the run date and time of the report, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

12. Click Queue to run the report or Close to close the window without running the report.

13. Click OK at the message stating the report has been queued and to use the Check Report Status option to view it. Refer to section 6.0 for information on checking the report status and opening them in Word and Excel.

5.4 Area Height and Weight Data File

1. From the Area Options Menu (Figure 5-1), click the Area Height and Weight Data File option.

2. The Area Height and Weight window is displayed (Figure 5-7).

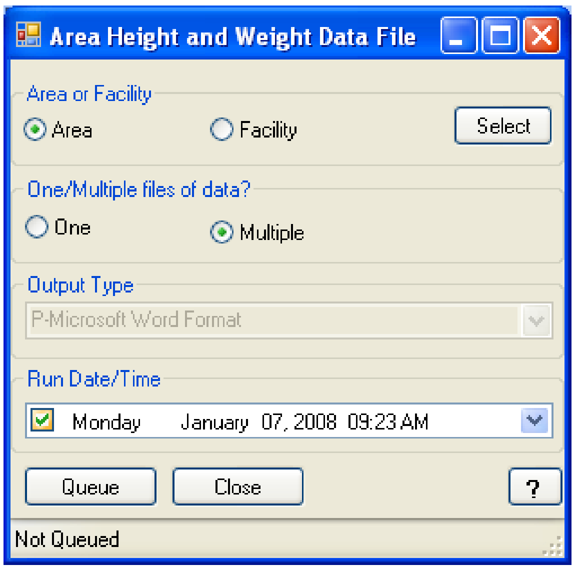

Figure 5-7: Area Height and Weight Window

3. Click the Area radio button to run a report that combines the data for all sites within the Area or click the Facility radio button to create a file that contains only childhood height and weight data for a single facility. The example here is an Area Aggregate report.

4. The Facilities window is displayed (Figure 5-8). All facilities that have had their data files uploaded for the National GPRA report, which is where the height and weight data is stored and comes from, are displayed.

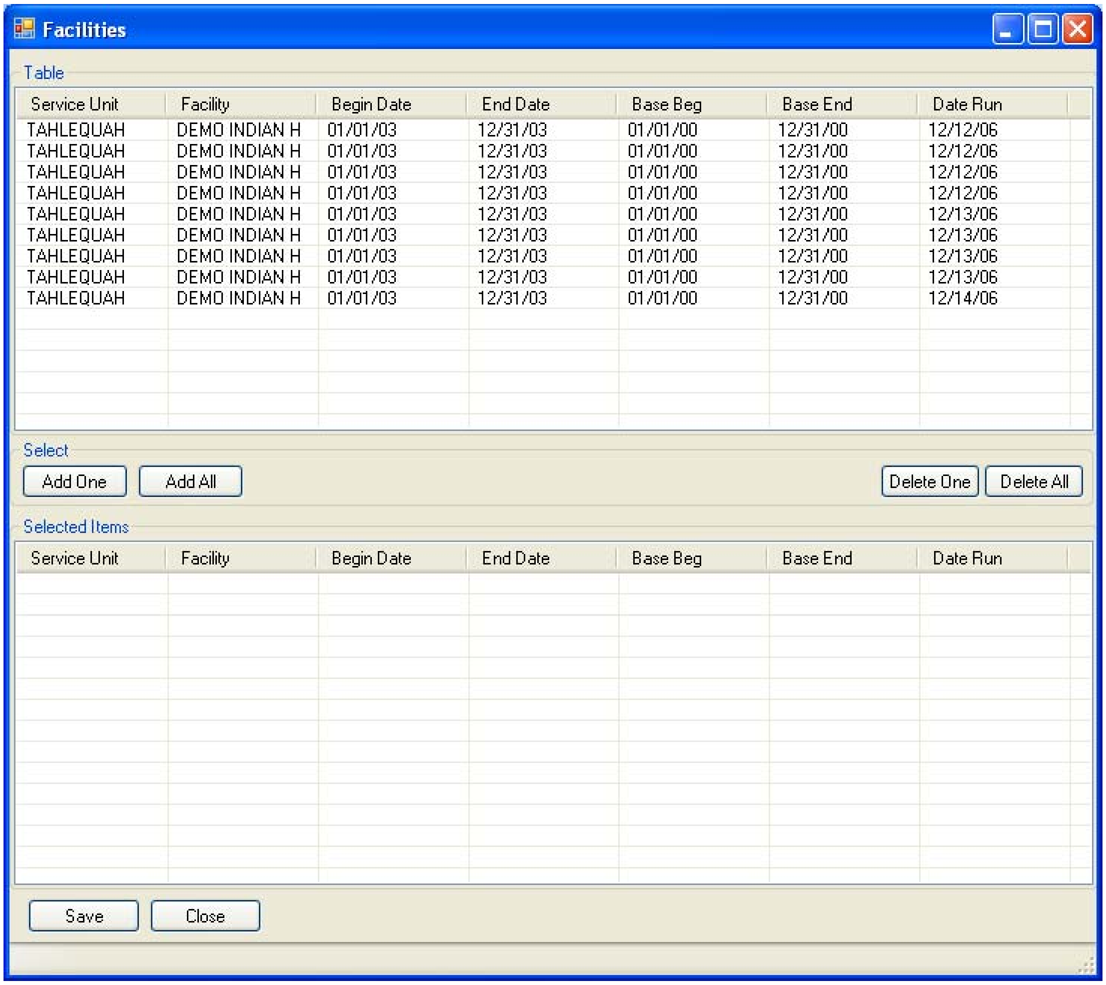

Figure 5-8: Facilities Window

5. To select the facilities to be included, click them, then click the Add One button. To select all listed facilities for the report, click the Add All button. To remove a facility from the Selected Items list, click the facility, then click the Delete One button. To remove all facilities from the Selected Items list, click the Delete All button.

6. Click the Save button when you are finished selecting facilities for the report.

7. Click the One button to create a single file containing all of the facilities' height and weight data. This single file should be sent to the California Area Office for forwarding to the IHS Division of Epidemiology. Click the Multiple button to create multiple files in the event the number of records in the file exceeds 65,536. The multiple file option will enable the files to be opened in Excel without any truncation of data. If you want both types of files, you will need to run one option first and then run the second option.

NOTE: There is no printed output option for this file; only delimited files will be created.

8. If you want to change the run date and time of the file, click the parameter to be changed (e.g. the run time) by clicking the item to be changed and pressing the up or down arrows. You may also type in a value, such as changing the time.

9. Click Queue to run the report or Close to close the window without running the file.

10. A message is displayed informing you of the name of the file and the directory to which it was written (Figure 5-9). Click OK. **NOTE: This delimited file may not be opened by using the Report Status option in the CRS GUI. As with the BG08, CRSGPRANT1, CRSGPRANT2, CRSONMNT1, and CRSONMNT2 files, it is located in a specific directory on your server. Contact your Site Manager to assist you with locating the file so it can be sent to the Area Office.**

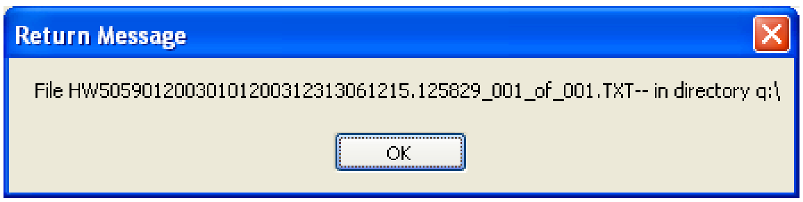

Figure 5-9: Area Height and Weight Data File Message

6.0 Check Report Status and Open GUI Report Files

The Check Report Status window will be used to: (1) view the status of reports you have queued to run and to (2) open the report files in MS Word and/or MS Excel. With the GUI, the files are now physically placed on the computer that was used to run the reports and the process of opening these files has been automated. The files are automatically assigned a filename, so you do not need to assign the name when you are running the report. However, report files beginning with "BG08" that are used for creating the Area Aggregate reports, the CRSGPRANT and CRSONMNT files, and the aggregated Height and Weight Data files (begin with "CRSHW") that are created when the Area National GPRA report is run, will still be written to your network's Public directory, which varies at each facility.

1. Click the Report Status button on the Visual CRS toolbar (Figure 6-1).

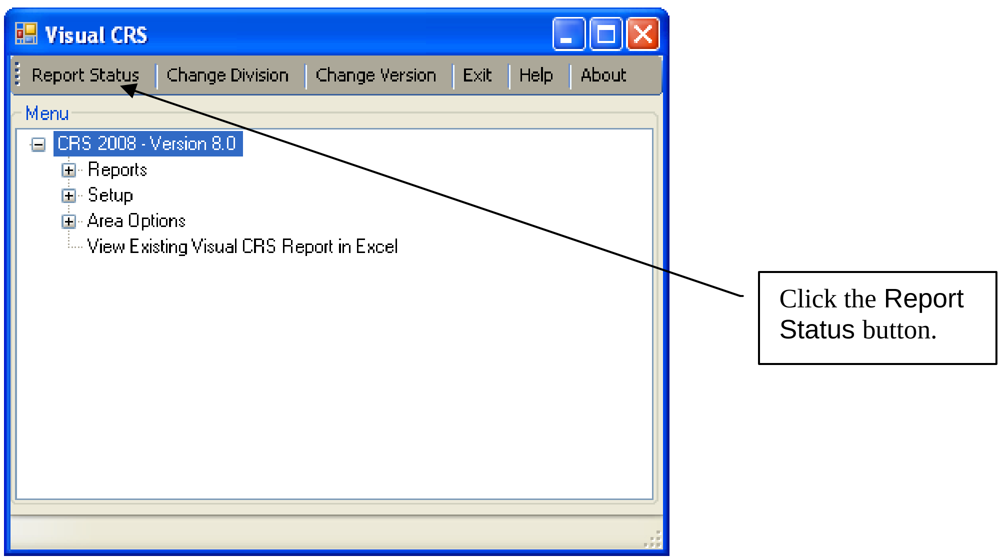

Figure 6-1: Visual CRS Window

2. The Report Status Check window is displayed (Figure 6-2). It lists in descending order (i.e. from most current to oldest) reports that are running and which have completed. Information about the report is displayed, including file name, the user name of the person who ran the report, the time the report started running and the time it ended, the type of report, the status of the report, and the output option. Click the Refresh button at the top right to update the report status.

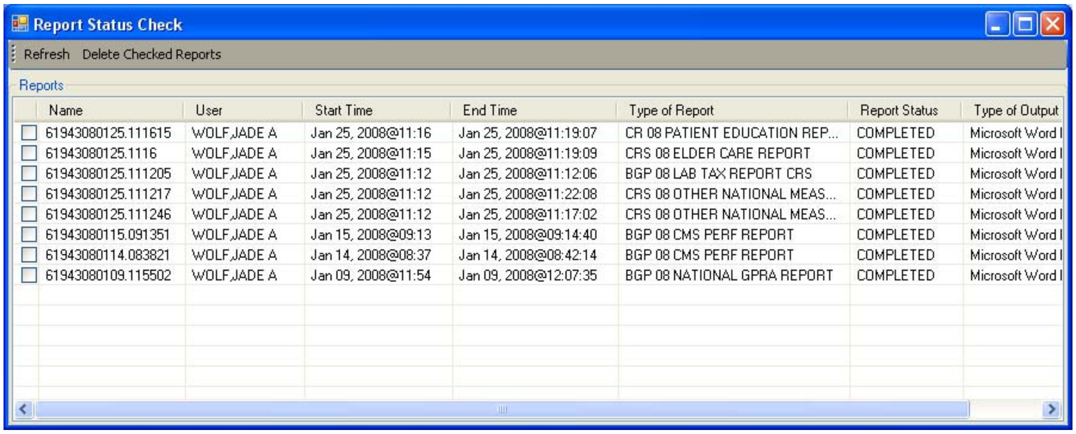

Figure 6-2: Report Status Check Window

3. To open a report, simply point to it and click. A loading message will display and after a few moments, the report will open. If you ran both the printed and delimited reports, the printed report will open first in MS Word. Both the printed and delimited reports are automatically saved with the assigned filename in the directory to which the Visual CRS software was installed on your computer. The default directory is c:\temp\cmi\visual crs\. However, you may save these files to a different directory on your computer with more meaningful names so they will be easier to identify.

4. If you ran both a printed and delimited report, after the printed report is opened in MS Word, the following message will be displayed:

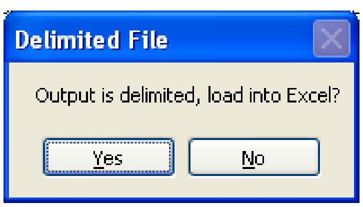

Figure 6-3: Delimited File Message

5. Click Yes to open the delimited file in Excel; otherwise, click No. The report will automatically open in Excel, with the delimiters removed. The report is automatically saved with the assigned filename in the directory to which the Visual CRS software was installed on your computer.

6. To delete a report, click the checkbox at the far left of the report name, then click the Delete Checked Report toolbar option. Reports that didn't complete for various reasons, such as the report was interrupted, and the start date was greater than six days ago will be automatically deleted.

7.0 View Existing Visual CRS Reports

1. From the Visual CRS window (Figure 2-2), click the **+** at the left of the CRS 2008 – Version 8.0 folder to open the CRS 2008 menu.

2. Click the View Existing Visual CRS Report option.

3. The Choose a File window is displayed (Figure 7-1) listing the existing GUI report files. Use the Files of Type drop down area to select Excel or Word files.

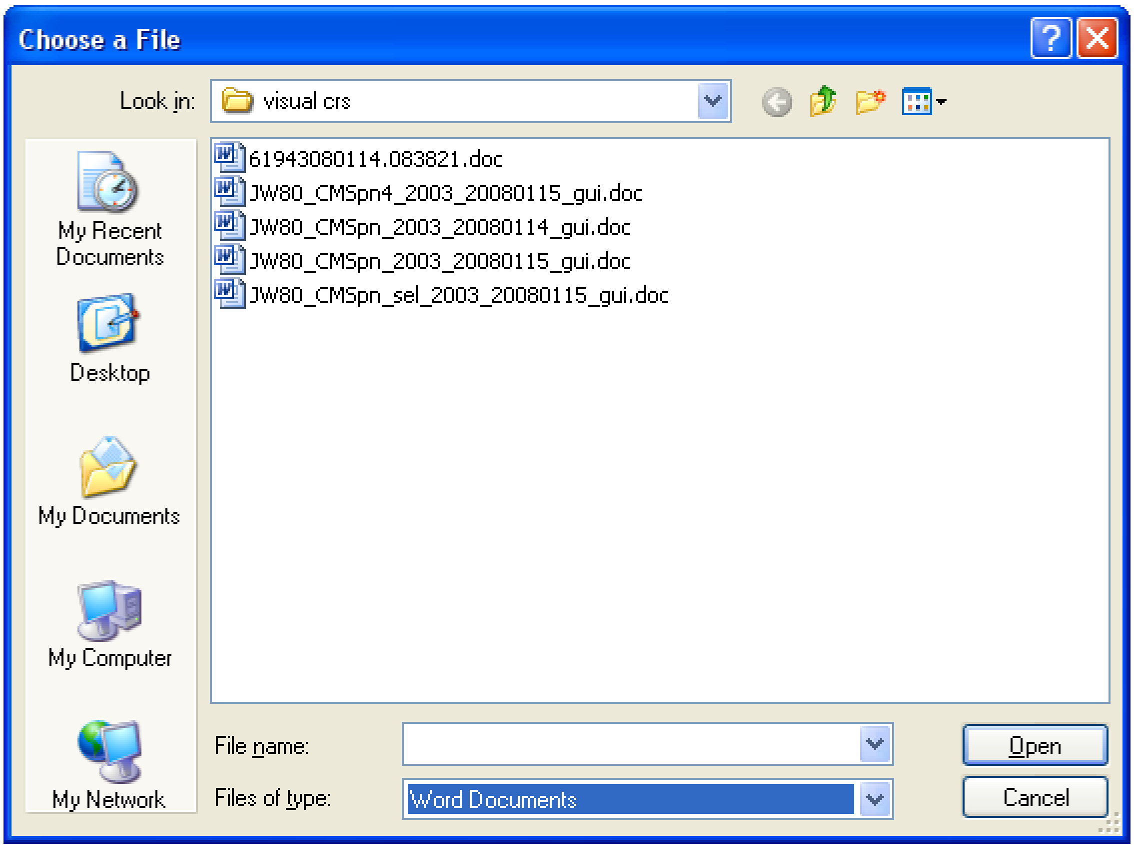

Figure 7-1: Choose a File Window

4. Click the file to be opened and click the Open button. The file is then opened in the appropriate application (Word or Excel).

Note: This option will only open files in the visual CRS folder that were not renamed in the saving process. The first file in the screenshot above is an example of a properly saved visual CRS Word file that can be opened through this process.

8.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk by:

Phone: (505) 248-4371 or

(888) 830-7280

Fax: 505-248-4297

Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm

Email: Support@ihs.gov